

WORKPOOL RELEASE NOTES

WorkPool Version : **4.5**
Release/Batch Number : **87434**

Internal Build Date : **2013/07/29**
Notes Prepared By : **Marius Botha**

CAUTIONARY NOTICE, PLEASE READ:

Should you upgrade WorkPool without confirming that all users are on appropriate browser versions as indicated in this document, users may well loose certain functionality causing unnecessary frustration and unnecessary business risk. Once the upgrade has been completed, downgrading to a previous version is **not** possible and you would be forced upgrade your browsers along with the required resource/financial consideration this entails. Please do note that the actual browser software is typically FREE to download.



SUMMARY OF MODULES / COMPONENTS AFFECTED

Module Changed/Affected	Significance / Effort
Calendar	Minor
Communications (Email & SMS/Text Message)	Medium
Dashboard	No Change
Directory	Minor
Files	Minor
Items	No Change
Process Management	Major
Tasks & Activities	Major
WorkPool System & Administration	Major

CHANGE LOG DETAILS

CALENDAR

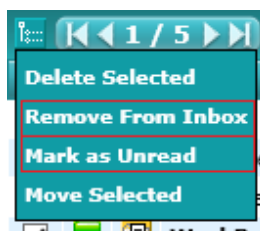
1. Minor Changes and Bug Fixes

- a. (88826) Fixed Bug: The Calendar Feed did not remove tasks that were declined by the user, i.e. these remained in the list when they should have been removed.
- b. (88828) Fixed Bug: Dragging and dropping a Calendar event in Firefox automatically opened the Task/Event after dropping the event in the new location.
- c. (88831) Fixed Bug: Users could drag and drop tasks on the Calendar to change their next action date without reading the content of the task first. I.e. users should not be able to change the Next Action date on a Task that is in an Assigned state as it means they are planning tasks without knowing the full extent of what the tasks entail.

COMMUNICATIONS (EMAIL & SMS/TEXT MESSAGE)

1. Addition of bulk "Remove From Inbox" and "Mark as Unread" to Inbox Menu (87441)

Two new menu items have been added to the drop-down menu under both the WorkPool and General Inboxes, namely: "Remove from Inbox" and "Mark as Unread". For users who scan through emails by opening multiple windows/tabs and then go back to them later, the "Mark as Unread" option can be used to restore all these emails to their unread state. The "Remove from Inbox" feature will allow users who receive a lot of notification emails or emails for their information only (e.g. CC'ed on general communications) to remove these from their mailbox in bulk. Please note that the standard rules, such as links to entry folders, will still apply and emails can only be removed should they be linked to entry folders.

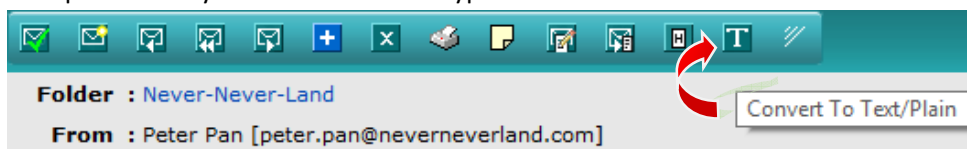


2. Indicate "Busy Processing" when Removing Email from Inbox or Deleting Email (87458)

It is possible that the action of removing/deleting an email from the inbox can take a few seconds. This could be for various reasons, including but not limited to: a slow network/Internet connection, over allocated server resources and browser performance/sluggishness. To prevent double submissions and to remove any doubt from the user's mind that "something is happening" when they click on an icon on the Email Action Panel, we now add a status message to the screen indicating that the server is busy processing an email as well as a "seconds" counter.

3. New "Change Email Content Type" toggle to expanded Email Action Panel (88839)

It happens from time to time that an HTML email is imported into WorkPool as a Plain Text email which results in the content being difficult to read ("gibberish") because of all the HTML tags in the body. This typically happens when the sender's email software did not set the email content type correctly or constructed the message in a non-conventional way, often intentionally to bypass spam or bulk email communication filters. To allow users to correct emails from legitimate senders/sources or extract content from emails they want to view a new toggle has been added to the expanded section of the Email Action Panel. This toggle will allow the user to permanently switch the content type of emails between HTML and Plain Text.



4. Support for Transport Layer Security (TLS) Protocol added to Email Client (91533)

Due to popular request and the adoption of this protocol by Office365.com we have now included support for the TLS standard. TLS is now an option when configuring a mailbox as well under the System Account Settings for default SMTP configuration. We also updated the code to accommodate non-standard port numbers in the configuration as these sometimes used the defaults irrespective of the number entered.

5. Change to Confidentiality Rule of Imported Emails, i.e. emails from external parties (87453)

Unlike many other legacy email clients WorkPool works on the principle of shared data; where this sharing of information also extends to email communication. When you download an email into a standalone email client (like Outlook) the sensitivity setting of an email (i.e. confidential, private, normal and personal) typically does not have any specific significance or rules attached to it apart from being an indicator to you (the receiver) of the nature of the email communication sent by the author. In WorkPool however the email communication could be shared by multiple parties (e.g. when linked to an Entry Folder or sent to multiple parties) or acted upon by various people when linking it to a Task/s. For this reason, if WorkPool honours the sensitivity of the original sender (e.g. a client) the other users in WorkPool will not be able to see and act on the content, which could be problematic if they need to act on the content. It does not make sense to ignore the client's sensitivity setting when such content should not be accessible to all users in WorkPool with access to the client's folder (e.g. in the case of a complaint or sensitive financial information). For this reason, WorkPool now allows the recipient/s of an email to override (reset) the sensitivity of an email using the Email Action Panel in cases where the content should be published to other users in WorkPool. Keep in mind that

all recipients on an email will already have access to the content, so this change is only required or applies in cases where the recipient/s make a conscious decision to publish this email to everyone with access to the Entry folder that the email is linked to. The sensitivity change can be changed by any recipient even after the email has been removed from their mailboxes. Once an email has been published to the public domain though it cannot be changed back – in line with WorkPool’s rules around access to information.

6. Minor Changes and Bug Fixes

- a. (91253) **Change**: The “Reply-All” function on an email will now remove the new author’s email address from the list (if present) in line with other email clients.
- b. (90723) **Change**: To improve database performance in majority of email-related queries the email Content has been moved to another table in the database. It is therefore no longer in the same table as the rest of the email information.
- c. (88854) **Change**: To improve performance during email downloads an index was added on the Internet Message ID for emails.
- d. (88823) Fixed **Bug**: In cases where an IMAP mailbox is configured for a user, WorkPool caches the user’s mailbox details to speed up connections to the mail server. Should the underlying details change WorkPool would typically throw an error and/or force the user to log out and then log in again. Additional error checking has now been added to warn the user in cases where the details change and to automatically update their cached settings when they update this from the mailbox configuration screen in WorkPool.
- e. (88829) Fixed **Bug**: The spell checker feature did not work properly on the email template screen in all supported browsers.
- f. (88844) Fixed **Bug**: The Text Message/SMS screen ignored the default communication number selected on the communications dropdown as well as the selected number (the number clicked on to send the message) when attempting to send an SMS from a number on a View. It selected all linked numbers by default.
- g. (89306) Fixed **Bug**: When sending bulk text messages (SMS’es) from a task, by means of a directory report, WorkPool would log a "Blank SMS" record on the task along with all the other SMS’es sent. This has been fixed and the migration will automatically remove these records from the database (where/if they exist).
- h. (89675) Fixed **Bug**: If WorkPool user A sent an email to WorkPool user B and added WorkPool user B’s email address twice (e.g. in the TO and CC fields) then user B would receive 2 items in their inbox for the same email, even though there was only one message. This caused a “concurrent modification” error and was fixed so that only 1 item will now appear in their inbox.
- i. (89677) **Change**: Outlook inserts special characters when a user replies to or forwards an email that demarcates the new message from the old content. As with most web based email clients WorkPool shows the top part of the message first and then allows the user to expand the message further on request, where these separators act as the point of

reference on where to stop/start. Additional start/end of email separators have been added as per latest Outlook software.

- j. (90187) Fixed **Bug**: The industry norm is to assign a globally unique message ID to each email sent via the Internet. WorkPool makes use of this message ID to identify emails upon download/import to prevent duplication of data and add links to the same email for all the recipients. It has occurred that some software vendors no longer honour this convention and therefore WorkPool could not correctly identify the message in the database and would add new links to old messages. Additional rules and checks have now been built in to prevent this.
- k. (90252) Fixed **Bug**: Users could remove the originating email from their inbox by accident if they used the forward/reply option to send a new email and then choose the "Close original email and return to inbox" option on the message sent confirmation screen.
- l. (90559) Fixed **Bug**: HTML emails downloaded/imported into WorkPool typically comes with their own set of styles which is imported along with the email. These styles don't always consider that an email will be displayed in a browser and can cause some of the text to be displayed "off" the screen, specifically the top section. Changes were made to counteract this.
- m. (90970) Fixed **Bug**: If a user used the browser's "Back" button to navigate from the "Confirm Receivers" page to the email content screen it would cause the system to create a second email.
- n. (91009) Fixed **Bug**: Additional rules added to prevent normal users from using existing email templates to access information on Views they do not have access to.
- o. (88835) Fixed **Bug**: Some users would send the URL (hyperlink) of a draft email to another user when they seek input or review. This allowed the other user to update a draft message created by another user. This is no longer allowed.
- p. (91007) **Change**: The act of linking an email to an entry folder will now trigger the system to check if there is an Alert message set on this Entry and if so, pop this up on the email screen as well. This is now consistent with the task creation screen.

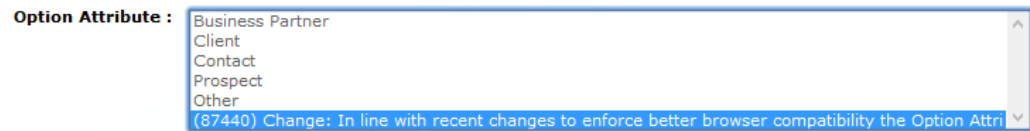
DIRECTORY

1. New Function to Move a View from one Entry to another (87437)

Since WorkPool provides a dynamic database environment, the structure of Entries and Views can change on a regular basis. As part of this process a client may want to move information on a View to another Directory Entry as they normalise and break Entries up into smaller pieces. In the past, a View would have to be deleted and then recaptured on another Entry with the same information to "move" it, which was time consuming and could result in an error in transposing the data. For this reason a new feature was added to allow a user with Admin access on the View to move it to another Entry. Audit notes will reflect this change. The "Move" button can be found on the View Edit screen.

2. Minor Changes and Bug Fixes

- a. **(87440) Change:** In line with recent changes to enforce better browser compatibility the “Option Attributes” (i.e. dropdowns or menu selections) on Views will now stretch automatically if the items in the list is too long.



- b. **(91760) Change:** Additional whitespace used for line breaks was removed from the “Text Attributes” on Views so they take the same amount of space as all other, single line attribute types.
- c. **(87435) Fixed Bug:** On some screens (mostly admin reports) the Entry Lookup controls caused JavaScript errors if the same entry was selected in multiple field locations on the same screen.
- d. **(88827) Fixed Bug:** Clicking on the column name to sort Email Messages under the Email Tab in the Entry Folder caused all emails in that folder to be retrieved and displayed.
- e. **(88830) Fixed Bug:** The Entry Statistics screen was no longer working (see Directory Administration).
- f. **(90150) Fixed Bug:** The system did not allow an administrator to change the case of the characters used in a “Permission Group Name”. I.e. you could not change the name of a group called “Bank Group” to “BANK GROUP” as it would complain about a duplicate name.
- g. **(88832) Change:** We no longer allow new Entries to be created, or existing entries to be renamed, where the Entry Name only contains 1 character. Since WorkPool does not allow Entry lookups for single character names it is unlikely that people were using this in the past.
- h. Fixed Entry **Assimilation Bugs:**
- a. **(88825)** The Entry Assimilation function did not consider Mailbox Rule Processors, which means it was possible that links to old, incorrect entry folders could exist.
 - b. **(90762)** If Entry A belongs to Entry B who Belongs to Entry C who again belongs to Entry A, a circular reference can be created. Assimilating these parents and children could cause problems during assimilation and the database to lock these errors.
 - c. **(90681)** Assimilating Entries belonging to an Entry Group into another Entry (not in the group) would cause errors while updating the new relationships.
- i. Fixed **JDBC Data Source Bugs & Changes:**
- a. **(89113)** The Manager column under the “History Report” was blank when executing the data source manually. This was changed to display the name of the user executing the report. The system will also notify the “Manager” (required field) in cases where it failed to execute based on the scheduler. This is now in line with the File Data Source scheduler.

- b. (90943) The JDBC Data Source would report as having run successfully despite failing to write the output to a file (where applicable). This was changed to report this as an error.
- c. (89076) The default Time Unit to on the JDBC Scheduler was changed from Minutes to Hours.

FILES

1. Link Documents in FILES to Email Templates and Flows (87443)

Users often make use of Email Templates in their day-to-day business communications. They generally attach one or more documents to the emails, where some of these will come from the FILES section as documents. The "File Upload" component did allow users to browse documents in the FILES section when they create a template, but the link that was stored in the database was a link to the last version of the document and not a link to the document itself. This meant that if a new version was uploaded to the document record under the FILES the template would still be pointing to the old version. This was changed so that the email template author can now create a link to a document record, rather than a version of that document, and ensure that all users use the latest version in communications.

The image shows two screenshots of a software interface. The top screenshot is a form titled "Link Reference Document" with a purple header. It contains four radio button options: "Upload File to WorkPool (size limit may apply)" (selected), "Find Document in FILES Module", "Specify URL (Web Address)", and "Link File (do not copy file to server, create link only)". Each option has a corresponding text input field. The "Find Document in FILES Module" option and its input field are highlighted with a red rectangle. A "Submit" button is at the bottom. The bottom screenshot is a preview of a web browser window titled "Link Reference Document - Windows Int...". The address bar shows "http://127.0.0.1:8080/component/file/file_link.jsp?tableName=rep". The page has a yellow header "Link Document in FILES section". It contains a "Document Name" label and a text input field, with a "Submit" button below it. To the left of the preview, there are two links: "Attach File:" with a folder icon and "Link Document:" with a document icon. The "Link Document:" link is highlighted with a red rectangle. Below these links is an "Active:" checkbox.

2. Minor Changes and Bug Fixes

- a. (92100) **Change**: A more user-friendly Error Message will now be displayed in cases where a link to a Document record is invalid or no longer exists (e.g. reference document on a Process Task). In the past this would throw a HTTP500 error.
- b. (87454) Fixed **Bug**: A user could not add a new document to a new folder, immediately after creating it.
- c. (89809) Fixed **Bug**: Clicking on the “Back” button caused an error from the “Add Folder” screen.
- d. (92044) Fixed **Bug**: It was possible to move a Root folder into one of its own children, causing an error on the database. Root folders cannot be moved into a lower spot on the same hierarchy.

PROCESS MANAGEMENT

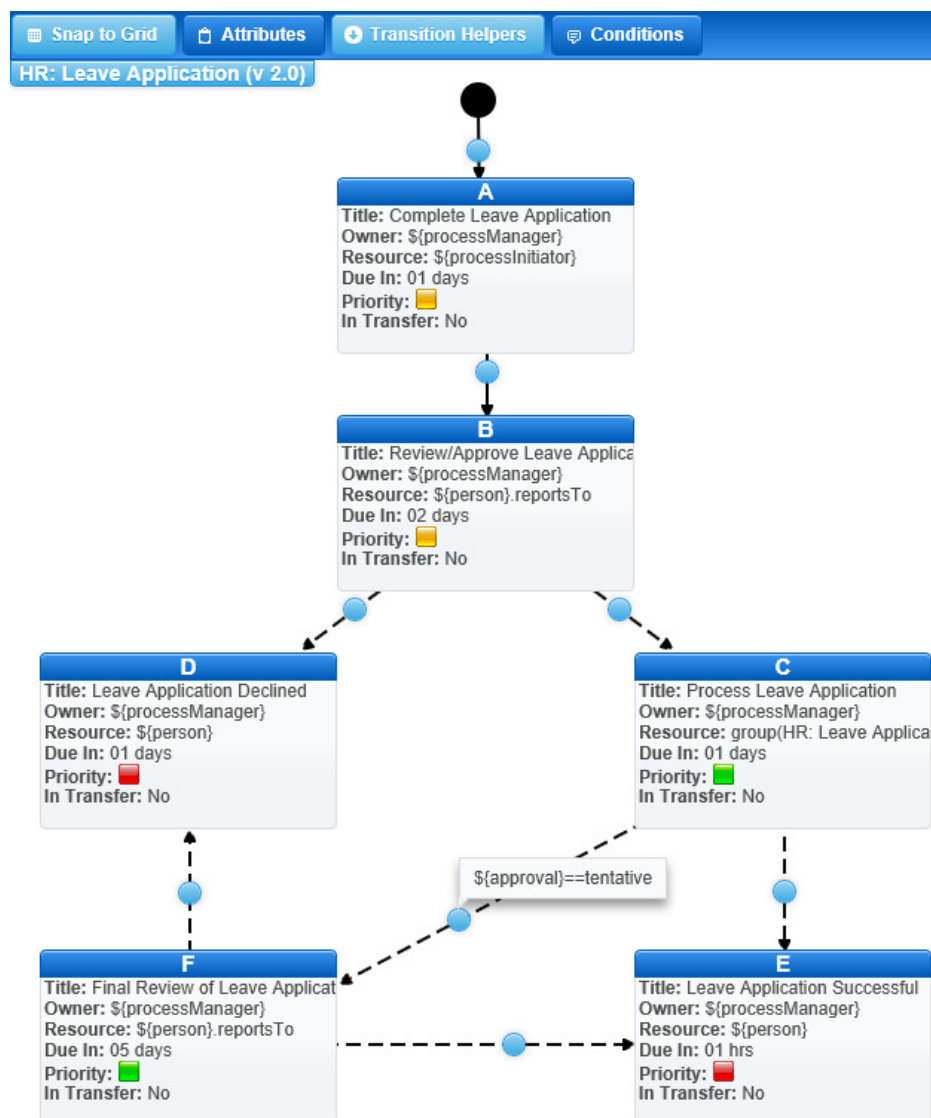
1. New Visual Process Designer (90515)

With this release of WorkPool we introduce a new, visual process designer tool that will allow business process mapping consultants and business analysts to design their own processes by means of a drag and drop interface. This interface significantly reduces the complexity associated to standard business process mapping (BPM). It also significantly reduces the amount of time typically required to map and then test a process from start-to-end resulting in a saving in time of several hours. By building this interface WorkPool empowers more users in the business, not necessarily technical users, to take control of their own processes, to design, implement, maintain and re-engineer these without external consultants being involved. To do BPM well takes time, practice and experience so we still encourage our clients to work with qualified consultants, especially in the early stages, to get their processes off the ground quickly and set themselves up for success.

By adding **this** feature the complexity of business process mapping in WorkPool is significantly reduced. For clients that make use of value added Business Analysts and Consultants the effort and thus cost of designing and deploying these process in WorkPool is significantly reduced freeing up both human and financial resources.

For clients who have never ventured into the realm of BPM, WorkPool now provides an ideal place to start to make processes a reality in their own business and enjoy the benefits this can bring as far as providing more structure, managing risk, etc. The fact that WorkPool integrates business processes seamlessly into the standard task lists and workflows of people makes it a powerful platform, uniquely able to equip business owners with the tools to implement processes with minimal training. Change management is easy to plan for and processes can be

adapted quickly based on feedback or changes in the business. See example below of a simple “Leave Application” process designed in the new Process Designer.

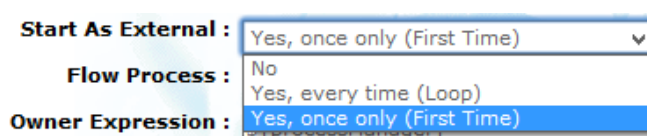


Since this is the first official version of the visual process designer it is likely that we will add more features and further enhancements in the near future based on feedback from customers. For this reason the final help and training documentation, as well as the new process designer course, will only be released later.

2. New Feature to Start Tasks/Processes from a Process, but outside of the Process Flow (87447)

We have had several requests from customers to add a new feature in the process engine that will allow them to trigger a new task or process from within an existing process, where this task/process can continue separately (independently) from the process that started it, i.e. where it will not affect or hold up the process that started it. The main benefit of this feature is

that it makes it possible for the process that kicked off the separate task/process to continue on its own route and complete in its own time without having to wait (depend on) the extra task/process to finish. We found that some processes remained active for long periods of time when the only reason for this was to wait for one of its children to close, where this child often had very little to do with completing the work the process was actually intended for. This feature is perfect for kicking off new processes automatically based on certain triggers, e.g. to investigate a certain anomaly in a process. Imagine a situation where a process is responsible to measure the customer's satisfaction and if this satisfaction rating is too low, kick off a process to do training on this resource when there is time, or investigate the circumstances around this event at a later stage without stopping the process. These processes can also be marked as private/confidential to remove them from the view of the resources involved. You can use the "Start As External" field on the Add/Edit Flow screen to mark a Flow as External (default = No).



Start As External : Yes, once only (First Time) ▼
Flow Process : No
Owner Expression : Yes, once only (First Time)

Please note that if a Flow is started as external it cannot form part of any transition logic. What this means is that you cannot create a transition leaving this Flow to bring it back into the flow of the process that started it. It is also not allowed to have any attribute actions on this Flow. This is because the task/process will be started as if it is a normal task on the originating process that has no impact on the other Flows in the process and may not affect data in the originating process. If it did have an impact or dependency it could not be called External. As indicated in the drop down menu above there are 2 options for starting a task/process as external. This is to cater for "loop conditions" on a process, i.e. where a certain group of tasks can execute multiple times until a certain condition has been met. These options are:

- **Yes, every time (Loop)** – This means that every time a Task on the process is completed with a transition to this Task (that resolves to true) this task/process will be created.
- **Yes, once only (First Time)** - This means that every time a Task on the process is completed with a transition to this Task (that resolves to true) the process engine will first check to see if another instance of this external task/process exists (irrespective of whether it is still active or not) and only create this task/process if it cannot find a flow of this type. So in essence the designer is guaranteed that there will only ever be one instance (if any) of this task started from this process in a loop situation.

3. Minor Changes and Bug Fixes


- a. (89347) Fixed Bug: WorkPool allows certain users (administrators) to update certain attributes (e.g. Resource Attributes) from the Process Summary screen. These actions were not being recorded in the audit trail as they did not belong to any specific task, however it is now recorded on the main Process Summary screen (Process Instance).
- b. (89819) Fixed Bug: Assuming a situation where Process A contains a step (i.e. a Flow) that happens to be a Process as well (Process B) and Process B is currently the active

step (or one of several active steps) in Process A. If the process manager now clicks the “Stop Process Instance” button the system would close off all the normal child tasks without executing any transitions, however process child tasks would be closed and then the system would still attempt to execute its transitions (if any). The “Stop Process Instance” button will now close off the child process in the same way as the parent and stop any execution on both.

- c. (87443) **Change:** A File Upload/Link control was added to the Add and Edit Flow screens to simplify linking of documents to Flows, including to documents in the FILES section.

Skip Reserved Days : ☐

Estimated Time : minutes

Ref Doc : 

Sensitivity :

Priority :

TASKS AND ACTIVITIES

1. New Screens to replace the old “My Tasks” module (86681 / 86653 / 90951 / 90561)

This release of WorkPool feature some major changes to the “My Tasks” module in WorkPool and will now consolidate several sections, previously listed separately under the main WorkPool menu, into a single unit. Features and screens moved & replaced include the following:

- Open Activities – Moved to “my tasks” menu
- Manage Resources – Moved to “my tasks” menu
- Task Search – Moved to “my tasks” menu
- General WorkPool – Replaced by “Custom Lists” (see “my tasks” menu)
- Task Tracker – Replaced by “Custom Lists” (see “my tasks” menu)
- Overdue Tasks – Removed (use Filter/Sort by options instead)



The “my task” menu and controls have also been updated and new icons added to represent the new features, or new locations of old features.

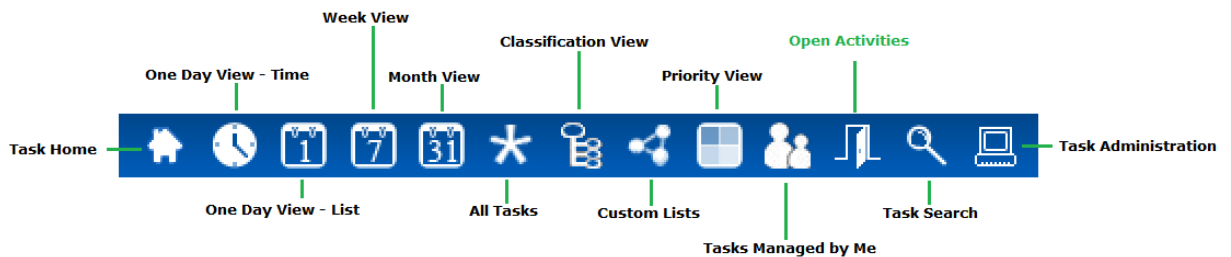
Old Menu:



New Menu:



New Icon Panel:

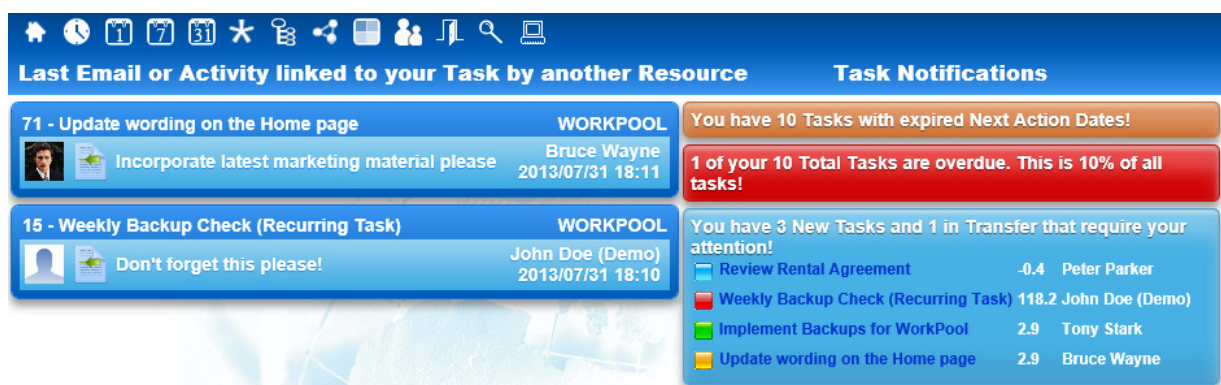


The New Task Screens Explained:

Please note that purpose of the release notes is not to replace or act as training material. Information below is for reference purposes only and will therefore only briefly discuss the new features and changes on each screen.

a. Task Home

This screen replaces the old “Inbox” area with a new look and feel and additional events/notifications. Updates to tasks will be listed as feeds (see left) with other interesting statistics and requests for action listed on the right.



b. One Day View – Time

As part of WorkPool’s time management philosophy of providing you with a single view of your commitments in time, whether they be calendar events (e.g. meetings) or task commitments (due dates, next actions and estimates). The “One Day View - Time” is a powerful new screen that will allow you to view all your commitments for a day and drag-and-drop commitments to plan your work and meetings (to the minute) to ensure you don’t miss anything and do not over commit your time. This is a brilliant way to plan your work or even to work from on a daily basis as an alternative to the “One Day View – List” screen. Many filters exist to allow you to add or removed due dates, process tasks, completed, tasks, etc.

31 July 2013												
Today												
Week 30 - Jul 2013												
Week 31 - Jul 2013												
Week 32 - Aug 2013												
Time	Task Title	Ref	P	S	Entry Folder							
Before 08:00												
08:00												
08:30	Build prototype vehicle exterior	38			Corrida Auto Replicas, Ltd							
09:00												
09:30	Review Rental Agreement	4			WORKPOOL							
	Weekly Backup Check (Recurring Task)	15			WORKPOOL							
10:00	Sales Meeting	7			WORKPOOL							
10:30												
11:00												
11:30	Order spares listed for workshop	39			Auto-Moto Classics Inc.							
	Implement Backups for WorkPool	42			Enaco Distributors							
12:00												
12:30	[RT] Perform Daily Checks - Backups	43			WORKPOOL							
13:00												
13:30												
14:00												
14:30												
15:00												
15:30	[RT] Vehicle Service - (Vehicle Name / Reg)	46			WORKPOOL							
16:00												
16:30	Confirm Appointment Details with Facilitator	47			Diecast Classics Inc.							
17:00	[RT] [Monthly] Recon of monthly power usage and	55			WORKPOOL							
	Update wording on the Home page	71			WORKPOOL							

c. One Day View – List

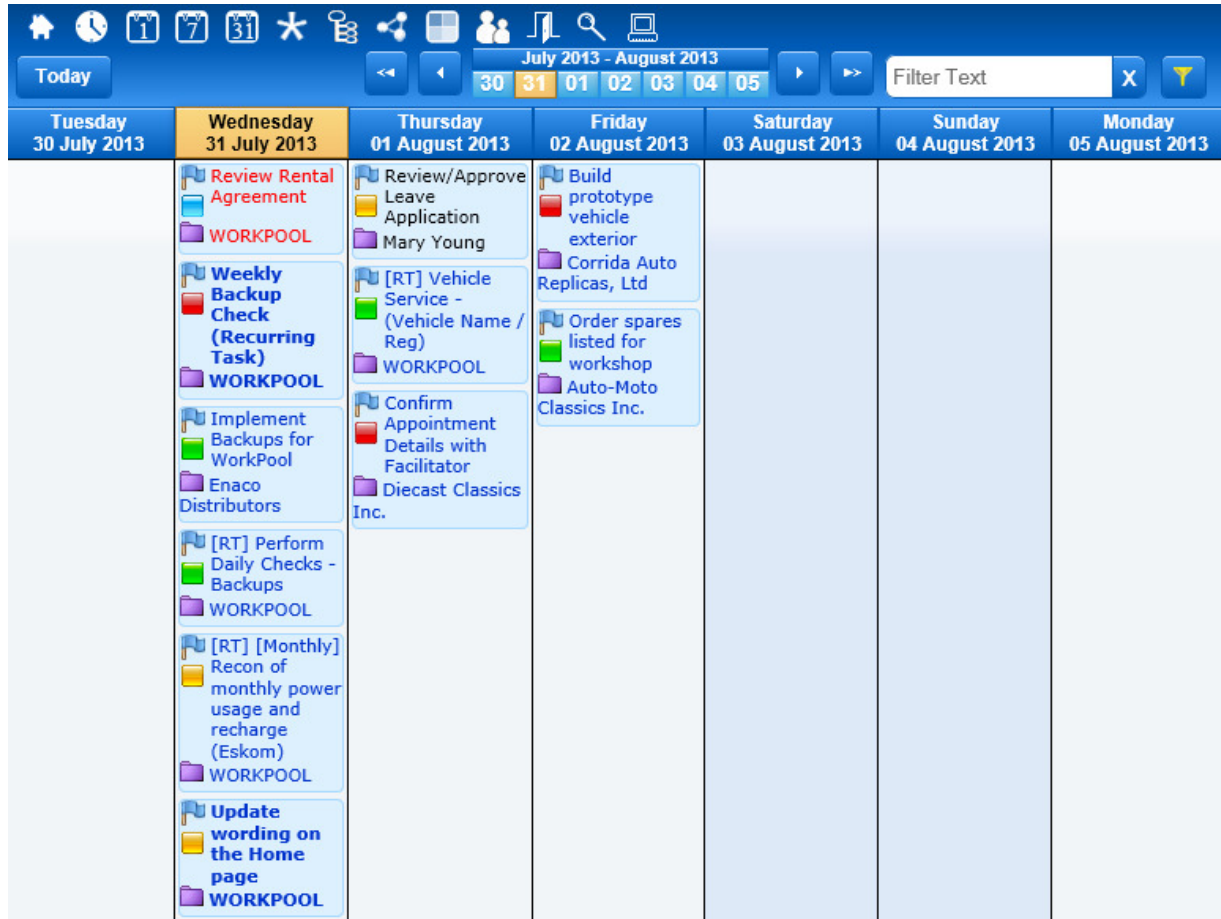
This screen replaces the old “Tasks to do for today” screen with a similar layout and application to the old one but with several new features and drag-and-drop support. On many of the new screens the drag-and-drop feature allows the user to drag one, or multiple tasks, and drop them on new dates in the calendar control to set their date/s without opening the task! This is great for planning. A handy context menu also pops up to allow the user to perform multiple other actions from this screen.

The screenshot displays the 'One Day View – List' interface. At the top, there is a navigation bar with icons for home, calendar, tasks, and other functions. Below the navigation bar, a calendar view shows the current date, 31 July 2013, and the days of the week. The main area is a task list table with columns: Ref, Title, Entry Folder, Pr, St, Type, and Assigned. The table contains several tasks, including 'Update wording on the Home page', '[RT] [Monthly] Recon of monthly power usage and recharge (Eskom)', 'Confirm Appointment Details with Facilitator', '[RT] Vehicle Service - (Vehicle Name / Reg)', '[RT] Perform Daily Checks - Backups', and 'Implement Backups for WorkPool'. A context menu is open over the task list, showing options: 'Update Next Action', 'Update 3 Tasks', 'Add to Task List', 'Update Due Date', and 'Update Priority'. The context menu also displays a list of dates from '31 Jul - Wednesday (Today)' to '11 Aug - Sunday'.

Ref	Title	Entry Folder	Pr	St	Type	Assigned
71	Update wording on the Home page	WORKPOOL				Tony Sta
55	[RT] [Monthly] Recon of monthly power usage and recharge (Eskom)	WORKPOOL				Tony Star
47	Confirm Appointment Details with Facilitator	Diecast Classics Inc.				Tony Star
46	[RT] Vehicle Service - (Vehicle Name / Reg)	WORKPOOL				Tony Star
43	[RT] Perform Daily Checks - Backups	WORKPOOL				Tony Star
42	Implement Backups for WorkPool	Enaco Distributors				Tony Star
39						
38						
15						Tony Sta
4						Tony Star

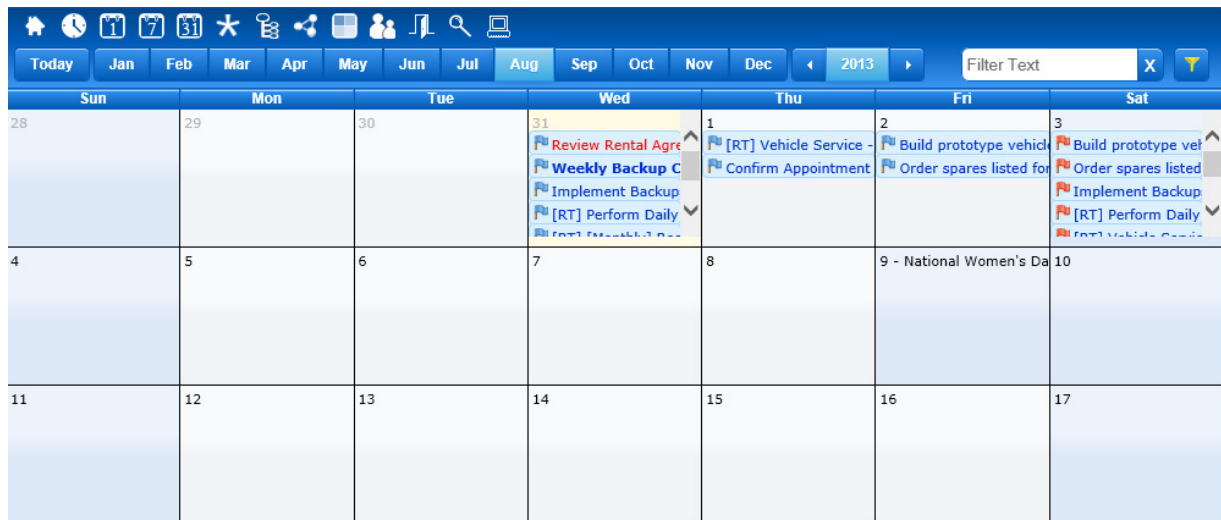
d. Week View

This screen replaces the old “Tasks to do for Week” screen with a similar application to the old one but a brand new layout as per example below. This page too contains drag-and-drop support and will also reflect non-working days such as public holidays and weekends in a different colour.



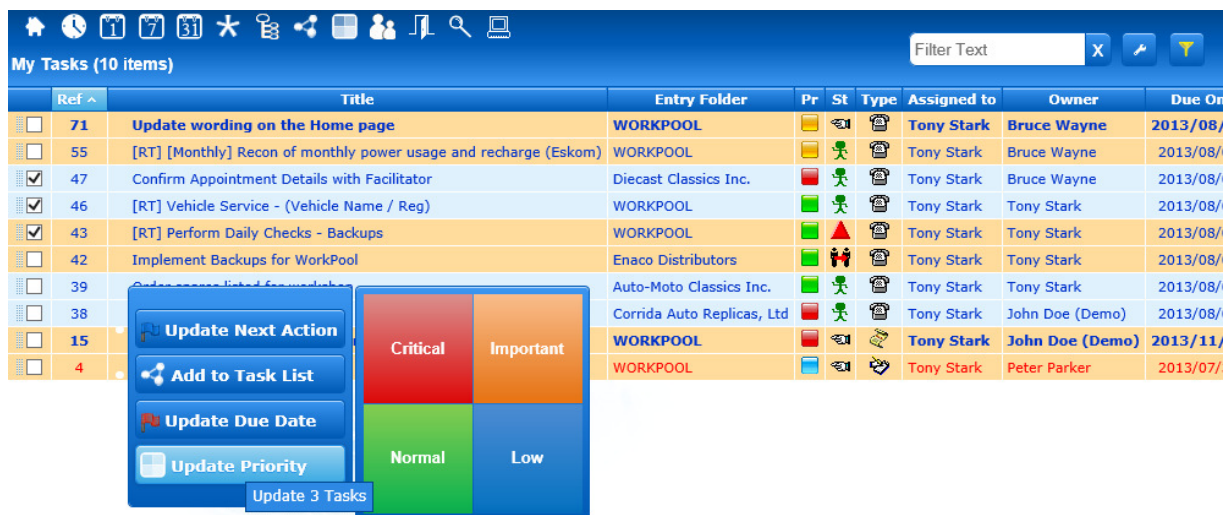
e. Month View

This screen replaces the old “Tasks to do for month” screen with a similar layout and application to the old one but with several new filters and drag-and-drop support.



f. All Tasks

This screen replaces the old “All Tasks” screen with a similar layout and application to the old one but with several new features, filters and drag-and-drop support, including the context menu to allow you to perform actions on multiple tasks at the same time to assist in planning and execution when dealing with large volumes of tasks.



g. Classification View

The Classification View allows a user to view all their tasks by Task Classification, where tasks with the same classification will be grouped together in lists. This is a great alternative to the “All Task” view for people who deal with many different kinds of tasks (multi-disciplined) or play multiple roles in the organisation. The classification view provides them with an easy to understand structure that will allow the user to plan and attend to tasks based on their classification type, which increases efficiency and can assist in identifying trends or bottlenecks.

The screenshot displays the 'Classification View' of a task management system. The interface includes a top navigation bar with icons and tabs: 'Show All Classifications', 'My Active Tasks', 'Managed Resources', 'All Active Tasks', and 'Select Resource'. A left sidebar shows a hierarchical list of task classifications: 'Collapse All', 'DEVELOPMENT (1)', 'FINANCE (0/1)' (with a sub-item 'Request for Payment (1)'), 'HUMAN RESOURCES (HR) (1)', 'OTHER (5)', 'SUPPORT (1/2)' (with a sub-item 'Assist with Backups (1)'), and a 'Total (10)' at the bottom. The main area contains a table of tasks with columns: 'Ref', 'Title', 'Owner', 'P' (Priority), 'Due Date', and 'N' (Status). The table lists five tasks: 'Review Rental Agreement' (Ref 4, Owner Peter Parker, Due Date 2013/07/31), 'Weekly Backup Check (Recurring Task)' (Ref 15, Owner John Doe (Demo), Due Date 2013/11/27), 'Build prototype vehicle exterior' (Ref 38, Owner John Doe (Demo), Due Date 2013/08/03), '[RT] Vehicle Service - (Vehicle Name / Reg)' (Ref 46, Owner Tony Stark, Due Date 2013/08/03), and '[RT] [Monthly] Recon of monthly power usage and recharge (Eskom)' (Ref 55, Owner Bruce Wayne, Due Date 2013/08/03). The background of the interface features a faint globe graphic.

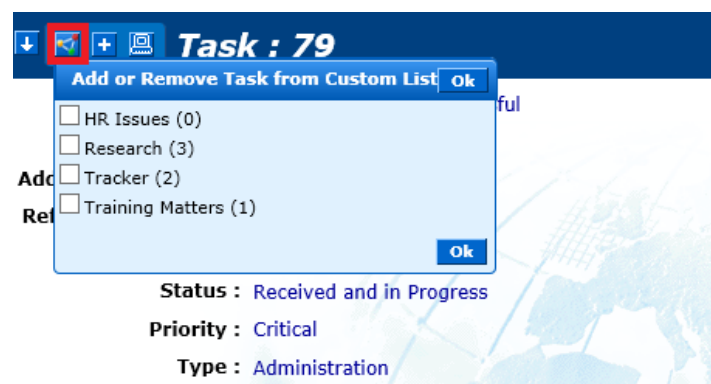
Ref	Title	Owner	P	Due Date	N
4	Review Rental Agreement	Peter Parker		2013/07/31	2
15	Weekly Backup Check (Recurring Task)	John Doe (Demo)		2013/11/27	2
38	Build prototype vehicle exterior	John Doe (Demo)		2013/08/03	2
46	[RT] Vehicle Service - (Vehicle Name / Reg)	Tony Stark		2013/08/03	2
55	[RT] [Monthly] Recon of monthly power usage and recharge (Eskom)	Bruce Wayne		2013/08/03	2

h. Custom Lists

The new “Custom Lists” feature is an extremely powerful new feature that allows users to create their own task lists. This allows people dealing with high task volumes to put a permanent or temporary structure in place to help them deal with these volumes and/or apply their own time management methodologies to doing their work. Tasks can be prioritized based on Rank to assist in planning and coordinating work and/or just to make sure the most important tasks get done first. Tasks Lists can also be shared between multiple parties, making joint planning, joint prioritisation and group efforts possible. Task Lists can be configured with permissions (both access to and management permissions) as well as special properties to auto-remove work as it gets completed (all with an audit trail). Custom Lists replace the old Tracker and General WorkPool screens as it clearly provides the same functionality plus much more. Each Custom Lists can now be configured to allow for its own tracking options.



A Task can be added to multiple lists (unlike classifications). You can also add tasks that have been signed off and archived to a list as a way to create collections of tasks (e.g. relates research) or group them together to identify and support emerging trends. Tasks can also be added to custom lists from within the normal Task View screen by using the icon as indicated below.



i. Priority View

WorkPool now provides you with a quadrant view reflecting the Priority value of all your tasks, or tasks assigned to other people. Users can now attend to work based on its priority and drag-and-drop tasks in different boxes to upgrade or downgrade their priority without opening the task. This is great for Support Desks or people having to attend to, or manage, high volumes of tasks. Bear in mind that as per previous screens, WorkPool will do a check before you perform every action to ensure the user performing the action does in fact have the permission to do so. This means that you can only change the priority if you are also the owner of a task (same applies to Due Dates, Next Actions, etc).

The screenshot displays the WorkPool interface in Priority View. The top navigation bar includes icons for home, clock, calendar, tasks, and other functions. Below the navigation bar, there are tabs for 'Manage Resources' and 'Tasks Assigned To', with a dropdown menu showing 'Tony Stark (4)'. The main area is divided into four quadrants based on priority:

- Critical (3)** (Red header):
 - Weekly Backup Check (Recurring Task) - WORKPOOL - Owner: John Doe (Demo)
 - Confirm Appointment Details with Facilitator - Diecast Classics Inc. - Owner: Bruce Wayne
 - Build prototype vehicle exterior - Corrida Auto Replicas, Ltd - Owner: John Doe (Demo)
- Important (2)** (Orange header):
 - [RT] [Monthly] Recon of monthly power usage and recharge (Eskom) - WORKPOOL - Owner: Bruce Wayne
 - Update wording on the Home page - WORKPOOL - Owner: Bruce Wayne
- Normal (4)** (Green header):
 - Implement Backups for WorkPool - Enaco Distributors - Owner: Tony Stark
 - [RT] Perform Daily Checks - Backups - WORKPOOL - Owner: Tony Stark
 - [RT] Vehicle Service - (Vehicle Name / Reg) - WORKPOOL - Owner: Tony Stark
 - Order spares listed for workshop - Auto-Moto Classics Inc. - Owner: Tony Stark
- Low Importance (1)** (Blue header):
 - Review Rental Agreement - WORKPOOL - Owner: Peter Parker

j. Tasks Managed by Me (Manage Resources)

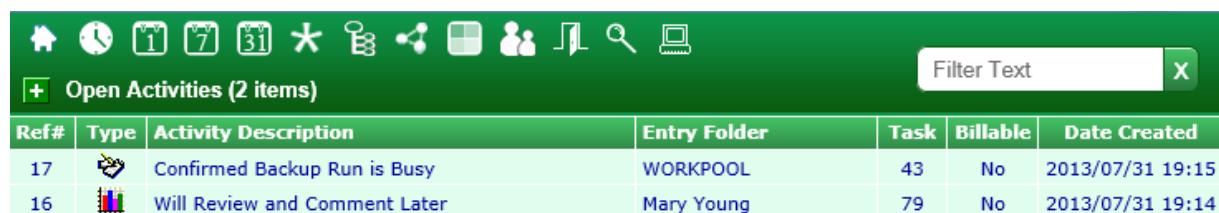
This screen replaces the old “Manage Resources” screen with a similar layout and application to the old one but with several new features and drag-and-drop support.



Ref	Title	Entry Folder	Pr	St	Type	Assigned to
60	Set up and install new Laptop	WORKPOOL				Peter Parker
46	[RT] Vehicle Service - (Vehicle Name / Reg)	WORKPOOL				Tony Stark
43	[RT] Perform Daily Checks - Backups	WORKPOOL				Tony Stark
42	Implement Backups for WorkPool	Enaco Distributors				Tony Stark
41	Research - Alternative ISP	WORKPOOL				Peter Parker
39	Order spares listed for workshop	Auto-Moto Classics Inc.				Tony Stark
20	Decision: Approve new Telephone Management System	ACME Inc				Bruce Wayne
11	Invoice: Final Payment for Phase 2 [£1,890.00]	Asian Treasures, Inc.				John Doe (Demo)
2	Compile Monthly Sales Report	WORKPOOL				John Doe (Demo)

k. Open Activities


This screen replaces the old “Open Activities” screen with a similar layout and application to the old one. Since Activities are typically logged to record the actions taken towards completing a task and to record time the “open activities” now reside under the Task Module.



Ref#	Type	Activity Description	Entry Folder	Task	Billable	Date Created
17		Confirmed Backup Run is Busy	WORKPOOL	43	No	2013/07/31 19:15
16		Will Review and Comment Later	Mary Young	79	No	2013/07/31 19:14

I. Task Search / Advanced Task Search / Process Attribute Search

This screen replaces the old “Task Search” screens (including advanced and attribute instance search). Task Search functions now reside under the Task Module.



SEARCH FOR TASKS OR ACTIVITIES

Search For : **Search**

☒ Tasks and Activities
☐ Tasks only
☐ Activities only
☐ Process Attributes only

Sort Order : ☒ Sort Descending
☐ Sort Ascending



[Advanced Task Search](#)
[Process Attributes Search](#)




ADVANCED TASK SEARCH



Search for these words (optional) :



☐ Exact match as a phrase only, do not search as keywords



Only show Tasks with Statuses : ☒ All (do not filter on status)
☐ Active Tasks Only
☐ Completed or Signed Off Tasks Only





Tasks Created Between : From :  To : 





Tasks Completed Between : From :  To : 



Tasks Due Between : From :  To : 

Task Assigned To :  

Task Owned By :  

Tasks Linked to This Entry Only :     ☐ Include Children

Tasks Linked to This Item Only :    

Classification :   ☐ Include Children

Show Billable Tasks Only : ☐

Exclude Archived Tasks : ☐

Filter by Process : ☒ Do not filter on Processes, include all tasks in search

m. Task Administration

This interface remains the same and is only visible to a Task Administrator. Clicking on this icon takes you to the same screen as the link on the “Add Task” screen.

n. View Task Lists for Resources

This screen replaces the previous screens by the same name and can be accessed from the main menu as per icon below. It may however be moved to the “my tasks” section in the future:



The purpose of this screen remains similar to the one it replaced, being to view the workflows of other users that you have access too. The individual task screens have been updated to the new screens as listed above, completely replacing the old look and feel of the previous lists.

Viewing Tasks for: Clark Kent

Internal Resources (6)

Bruce Wayne

Clark Kent

John Doe (Demo)

Peter Parker

Tony Stark

Virginia "Pepper" Potts

External Resources (0)

Resource Groups (5)

Finance Department

Human Resources Department - H

My Tasks (15 items)

Filter Text

	Ref ^	Title	
<input type="checkbox"/>	73	Modify Leave Process	WORKP
<input type="checkbox"/>	72	Process Building and Maintenance	WORKP
<input type="checkbox"/>	66	Create Custom Leave Report per Resource (period based)	WORKP
<input type="checkbox"/>	65	Create Custom Annual Leave Report	WORKP
<input type="checkbox"/>	64	Create Custom Monthly Leave Report	WORKP
<input type="checkbox"/>	63	Create Custom Dashboard	WORKP
<input type="checkbox"/>	62	Custom Development: Leave Process Reports	WORKP
<input type="checkbox"/>	57	Get copy of Bank Statements (3 months) for Finance Application	Australi
<input type="checkbox"/>	52	RTJ Check petty cash float	WORKP
<input type="checkbox"/>	48	Investigate: Client Complaint	Vitachr
<input type="checkbox"/>	45	Follow-up - Return Peter's Call	WORKP
<input type="checkbox"/>	31	Send out FICA notifications	WORKP
<input type="checkbox"/>	30	Print out Schedule for Session	Enaco C
<input type="checkbox"/>	16	Create Automated Sales Report	WORKP
<input type="checkbox"/>	5	Update product sheet with latest features	WORKP

2. Minor Changes and Bug Fixes

- a. (91454) **Change:** An “Entry Folder” column was added to the "Reassign Recurring Task Ownership" screen to allow for better identification of recurring tasks, especially when they have the same title (as would be the case if you assign the same type of task to multiple parties).
- b. (87445) **Change:** WorkPool will now use the “Archived On” date to determine if a task has been archived or not, we therefore removed the isArchived field from the database as it was no longer serving any purpose. This may affect JDBC reports configured in the system – if they rely on this column to be present – however is easy to adapt to using the date column.
- c. (87448) **Change:** WorkPool will now use the Task Status field (only) to determine if a task is in Transfer, therefore we have removed the "ownershipInTransfer" field from the database to prevent any ambiguity. This may affect JDBC reports configured in the system – if they rely on this column to be present – however is easy to adapt to using the status column.
- d. (87438) **Change:** Addition of an optional “Resource” Filter on the “Resource Performance Task Summary Report” to allow clients with a large number of users to limit the report to 1 or more users as opposed to running the report for all users all the time.
- e. (87442) **Change:** The “Delayed” task status is generally used by the Resource to indicate to the Owner that a task has been delayed, typically for reasons outside his/her control or because they are waiting on someone else (e.g. the client) to come back to them. The Owner can then edit the task and can change the status to acknowledged (a status that is not available to the resource) to indicate to the Resource that the owner is aware and/or agrees with the situation. In cases where the Resource of the task is also the Owner of the task the status can still be set to Delayed as a way for the resource/owner to see, at a glance, that this task does not require attention right now. The current Task Edit screen does not take this into consideration though. I.e. the Resource (who is also the Owner) can mark the task as delayed on the SHOW task view but not on the EDIT view. The Edit screen now allows the user to set the same Delayed status.
- f. (87446) **Change:** Changed the Task Action Panel to implement support for Safari Browser as well as Internet Explorer 10.
- g. (88838) **Change:** Tasks assigned to External Resources now appear in the Owner’s Task Lists (since they are responsible). Tasks can also be marked as complete from the View Task screen (no longer need to go to Edit Task screen).
- h. (88845) **Change:** The “Task Scheduler Bulk” function under “Task Administration” now allows the Administrator to make changes to the Next Action dates. There are justifiable reasons why an admin would want/need to change another person's Next Action dates in bulk and therefore this is now allowed. Taking this action will result in WorkPool adding a note to the Task indicating what was done, when and by whom. Please note that access to Confidential and Private Tasks will still be restricted as per the standard rules, despite the user being an administrator. For restricted tasks it remains the

responsibility of the owner/resource to manage this, however the administrator will be able to see that there are tasks in the list they do not have access to.

- i. **(87450)** Fixed **Bug**: The popup message warning the resource that a Task they have just updated has a Next Action Date that is currently in the past (expired) would pop up under certain conditions when a user was working on the same task in multiple tabs/windows, despite having changed the next action date in another window.
- j. **(87452)** Fixed **Bug**: Fixed some text alignment issues in the table containing child tasks (as displayed on the parent task) as well as process attributes (under the blue bubble).
- k. **(88824)** Fixed **Bug**: The Task totals under the “Task Bulk Archive” function did not match the “Resource Deactivation Task Totals”.
- l. **(88842)** Fixed **Bug**: When transferring tasks to a Resource Group where the “auto transfer” option has been enabled, the email notification sent to the members was sent from the new owner’s email address instead of the person performing the action. Furthermore, in cases where a task is assigned to a resource group and the task owner is also a member of the same resource group, no notification emails was sent out to the other members of the resource group if the owner changed the task.
- m. **(88843)** **Feature Removed**: It is possible to link the same activity to multiple tasks, e.g. in cases where one activity (like a phone call or fax) results in multiple tasks. This option remains a function on closed Activities, however has been removed from Open Activities to ensure the integrity of data and prevent users from removing activities from tasks after the fact.
- n. **(88837)** Fixed **Bug**: The “Expand All” function under the Task History section would include all “Automated Communications” by default, when this should be excluded as per the default filter. Also, the background colour of the email body (content) would sometimes be inconsistent with alternating row colour of the items in the history section.
- o. **(90513)** Fixed **Bug**: In cases where a Recurring Task was set up to start a process and that process definition was no longer functional at the time the recurring task kicked off (e.g. the groups and expressions no longer resolved to valid resources) the system would fail to start the process, but keep on trying. This resulted in extra tasks and email notifications being created until such time as the user disabled the recurring task.
- p. **(91352)** Fixed **Bug**: If a Task Title contained a “\” character in the title, the Subject of the Task Notification message would contain a double slash “\\” instead of a single slash.
- q. **(87439)** **Change**: Since the Task object predates the Activity object in WorkPool there was a time where one could log time on a Task only (i.e. without an activity). This field remained on the Task screen (see “Add Task” and “Edit Task” screens below) and could be used by the owner log time on a Task while creating the Task. This was useful in cases where you complete a task at the same time you create it, e.g. logging a call from a client where you resolved the query during the same call and do not need to take further action. The Edit screen allowed the owner to go back and change this again afterwards, if necessary along with deferring any time (if applicable).

Add Task Screen

Add to Tracker : ☐
Billable : ☐
Complete Task : ☒
Time Taken :

Edit Task Screen

Add to Tracker : ☐
Billable : ☐
Time Taken : minutes
Time Deferred : minutes
Percentage Completed : %
Task Status :
Date Created : 2012/11/06 09:00
Date Completed :

In this release of WorkPool we removed this field from the Task object (in the database), however we kept the feature as per screenshot below. The only difference is that any time entered into this field will now automatically be logged as an Activity (of the same Type) on the Task you are creating. This means that the Time Taken and Time Deferred fields on the Edit screen fall away as time can no longer be linked on tasks. All old Task information will automatically be migrated and an activity added to these tasks to record the time.

All time based and administrative reports in WorkPool have also been updated with this change. This change may affect JDBC reports configured in the system – if they rely on the old task information to be present – however it is easy to adapt to use the Activities instead. The “Estimated Effort” field was also updated to store the Time Unit (see screenshot below) as this always defaulted to “Minutes” even if “Hours” was selected.

START TASK

Select the Process to Start : None selected

Title :

Description :

Electronic Folder :

Assign To : Tony Stark (4)

Transfer Ownership : ☐

Type : Administration

Reference Doc/URL :

Classification :

Priority : Normal

Sensitivity : Normal

Due Date : 2013/07/31 15:11

Next Action Date : 2013/07/31 15:11

Estimated Effort : minutes

Task Predecessor/Parent :

Activity Time Taken : minutes

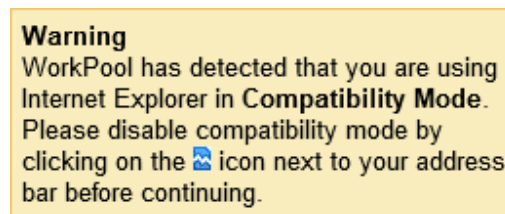
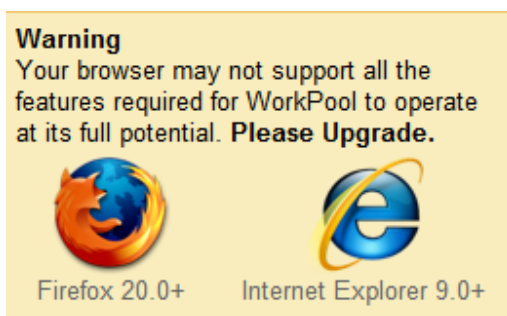
Time Started : 15:11

Save

WORKPOOL SYSTEM & ADMINISTRATION

1. Changes to Browser detection and version warning (88846)

As part of our ongoing efforts towards supporting multiple browsers and providing a consistent user experience across these browsers we have made several changes. As mentioned under the Task Management section it has now become imperative that users make use officially supported browsers only to ensure they have access to all the features in WorkPool and that these work correctly. We have recently started to include Safari in our testing efforts to provide better support for this browser. We have also updated the browser detection and warning message on the login screen to inform users when they are using a browser that is not supported, or running a browser in compatibility mode



2. Java Server Faces Technology Removed from WorkPool (89086)

The main reason the “WorkPool System & Administration” module has been marked as undergoing “**Major**” change rather than “**Medium**” change in the summary on the first page is

because this release marks the final removal of the Java Server Faces (**JSF**) framework from our codebase. This change goes hand in hand with the new Task Screens released in this version, where the old Task Screens were still making use of JSF technology. Most other screens using JSF have been replaced over the last couple of years as we add new features so the impact to users will be minimal. We could however remove a lot of unnecessary libraries from our code and free up more server resources.

3. JQuery Library updated to version 1.9.1 (87451)

WorkPool makes use of several underlying components and libraries to expedite development and ensure we do not reinvent the wheel. One of these libraries being the JQuery library. We use this library for many of the special effects and validation on the client side (the browser). Our version of this library was updated to version 1.9.1.

4. Adding of Additional Indexes to Improve Database Performance (92227)

As the data volumes grow and databases increase in size it is important to do more “fine tuning” inside the database to configure it in a way that it can use resources more effectively and efficiently. To this end several indexes were added to the database to speed up frequently used queries.

5. Database Changes to Remove Reserved SQL Words from Table & Column Names (87449)

As part of our efforts to provide our clients with choice when it comes to our architecture we have taken steps to remove any reserved SQL words from the database table names and table column names. This is an ongoing exercise, however many of the tables were updated as part of this release to address this requirement.

6. Minor Changes and Bug Fixes

- a. **(91135)** Fixed **Bug**: In cases where the system administrator did not configure the File Upload settings, a maximum file upload size of 1MB would apply by default (applicable to new clients only). This was changed to remove the defaults so the administrator is forced to configure these settings.
- b. **(92046)** Fixed **Bug**: WorkPool did not allow files to be uploaded with quotation or apostrophe character in the file name.
- c. **(91414)** Fixed **Bug**: Attempting to insert a Resource Job Title longer than 50 characters caused an error.
- d. **(89412)** Fixed **Bug**: The information panel that appears when a user is forced to change their password indicated that the user will be logged out upon completion of the change, which was incorrect. Logging out is not required.