WORKPOOL RELEASE NOTES

WorkPool Version	:	**4.7**	Internal Build Date	:	2015/04/14
Release/Batch Numbers	:	**101967/104938**	Notes Prepared By	:	Pierre Norden

Summary of Modules / Components Affected:

Module Changed/Affected	Significance / Effort
Calendar	Minor
Communications (Email & SMS/Text Message)	Major
Dashboard / Intranet Home	N/A
Directory	Medium
Files	N/A
Items	Minor
Process Management	Major
Tasks & Activities	Medium
WorkPool & System Administration	Major

CHANGE LOG DETAILS

CALENDAR

1. **Enhancements, changes and corrections to Calendar integration functions (108709)**

   Various changes were made to the calendar module to meet user expectations for features typically found in Calendaring software. This includes but is not limited to:
   - A new feature to allow the user to propose a new time for a calendar event, directly from the event invitation email.
   - Changed the functionality of the "Import to Calendar" button by replacing it with three new buttons, "Accept", "Accept Tentatively" and "Decline".
   - Corrected a bug which disabled the save button on the event creation screen, when an error occurred when trying to save the event on a previous attempt to save the event.
   - Corrected an issue where events amended by another party did not update the event in WorkPool.
   - Declining a series or recurring events did not decline all of the future events in the series, which had not occurred yet, particularly in the case where some of the events in the series had already occurred.
   - Spanned Events (this is a single event which has a start and an end date that does not fall on the same day, or begin and end in the same week or month) would sometimes not be visible on the day and week views, while still visible on the month view.

2. **A message was added to notify users of the Recurring Calendar Event constraints (114404)**

When creating a recurring calendar event the total number of occurrences cannot exceed 30 events, a message was added to the Event Creation screen to hi-light this to users.

3. **Minor Changes and Bug Fixes**

   a. (**110572**) Fixed Bug: Links to Calendar Invitations were not removed when deleting email addresses from Entry Communications.
   b. (**110571**) Fixed Bug: When duplicating "All Day" events, the duplicated events were not marked as all day events (did not span).
   c. (**110544**) Fixed Bug: Calendar allowed double booking of an Item as well as missing Audit Notes for calendar actions taken on Items.
   d. (**116830**) Fixed Bug: Calendar Feeds were not honouring the "Prevent Access to Views based on Business Unit Membership" setting.
   e. (**116595**) Fixed Bug: All Day Calendar Event sent from Outlook would span 2 days in the WorkPool Calendar.
   f. (**116180**) Fixed Bug: Calendar invites were not offering to notify invitees after a change was made to the Calendar invite.
   g. (**115906**) Fixed Bug: Inviting Internal Resources as an external attendee resulted in calendar invitations that could not be accepted.
   h. (**115229**) Fixed Bug: The Calendar search function was not working as expected.
   i. (**114806**) Fixed Bug: A "Null pointer Exception" would be generated when opening an event from the drop down reminder panel.
   j. (**114619**) Fixed Bug: Calendar events that Span over multiple months were only showing those days that fell on the starting month.
   k. (**114405**) Fixed Bug: When choosing "Delete Series" to remove calendar invites nothing would happen.
   l. (**113948**) Fixed Bug: A number of general Calendar specific issues (in addition to those listed here) were corrected.
   m. (**113913**) Fixed Bug: Calendar Search would show events for all users even when a specific user was specified.
   n. (**110571**) Fixed Bug: Creating All Day Series of events made only the first event "All Day", the rest were spanned.

COMMUNICATIONS (EMAIL & SMS/TEXT MESSAGE)

1. **Changes to Email Download and Email Sending services - Phase 1 (105196)**

    As part of a larger project to expand on WorkPool's email related services and capabilities we have embarked on a project that will make a number of fundamental changes to the WorkPool Email Services. These changes will improve the way emails are sent and received (especially when running many mailboxes on the server) and preparing the system for changes to the way mobile devices interact with WorkPool by adding more intelligent and advanced services for email management in WorkPool.

    The following changes were made:

    a. New Control Panel: Email Message Download Service (106466)

        This new dashboard will allow the WorkPool Administrator to monitor and control the downloading of emails as well as provide them with facilities to control, identify and deal with email issues. This new dashboard is intended as an improvement and replacement for a number of utilities and fail safes currently built into WorkPool. The new dashboard will provide more insight and information on emails being downloaded into WorkPool.

        The new control panel allows a system administrator to stop and start mailboxes individually or to stop and start the entire downloading service. This is very useful in cases where for example system imports are taking place, as it can prevent emails from being downloaded and therefore a restore can be done without losing any emails imported since the last backup.

        The system will now notify a user if there is a problem with any one of their mailboxes that stopped the server from downloading emails by adding an email into their mailbox. The user can then take action on their own to identify the problem and retry the download until the problem has been resolved.

        Simply clicking on the status icon indicated above will either start or stop the individual mailbox download, alternatively the entire service can be stopped or started again form this screen. Starting or stopping mailbox downloads in bulk can only be done once the Download Service has been stopped by selecting the appropriate mail boxes tick box.

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b. New Control Panel: Email Message Sending Service (105938)

Just like the Email Message Download Service dashboard in the previous point a new dashboard was created to track and manage actions around the sending of emails, including new features to manage bulk messages. The WorkPool sever can now send multiple emails simultaneously as opposed to on a queue basis as it did in the past (first in first out). Furthermore, normal email messages will now take priority over bulk messages, i.e. they will no longer have to wait and fall into a queue until the bulk messages have been send, which could take several hours. The new control panel also allows a system administrator to stop (suspend) sending temporarily, which is useful in cases where there is either a problem with the mail server or you want to control the volumes sent to the mail server/s manually.

Any Bulk Emails containing failed expressions (values read in from the clients View/s), that are sent out will no longer display are rejected emails under the "Sent Items" folder. Instead these emails will be displayed in the "Drafts" folder, allowing the user to manage these emails with ease via the bulk email actions i.e. delete all selected emails.

c. Changes to Mailbox Configuration screens (106467)

Since mailbox downloads are now managed as a separate process there are new rules relating to the way emails are download and new controls available to users. Downloading of mailboxes no longer take place sequentially, but rather independently and in parallel based on system resources available. As a result, mailboxes could be busy downloading emails on the server at the same time as a user wants to make changes to their mailbox configuration, including deleting or disabling it. To ensure that the user cannot update information while the system is busy, the mailbox configuration screen was updated to prompt the user to first disable a mailbox (if it is active) by clicking on the "Stop Downloading" button before changes can be made.


This action will then notify the server to stop further work on this mailbox and complete what it is doing. Once stopped the screen will allow changes to the mailbox, which will then be resubmitted (if applicable) to the server to continue its work.

2. **New feature to add/link an email to multiple tasks when composing (110247)**

As users gain experience on WorkPool and they split tasks into smaller units of work (child tasks or related tasks) or start to use processes, their requirement to link a single email to multiple tasks increase so as to ensure that the audit trail remains intact. So too, if a user replies on an email that is linked to multiple tasks they typically want to link the email they send to all the same tasks. Until now, WorkPool allowed only a single task link upon sending, which meant users had to open the email again and add additional links to other tasks afterwards by entering task numbers manually or listing the tasks in the same folder.

As of version 4.7, WorkPool will now by default link new emails to all the same tasks that the originating email was linked to. I.e. if you reply on an email linked to [TASK:1234] and [TASK:4567], the draft message will now be linked to both [TASK:1234] and [TASK:4567] by default.

The user can then unlink tasks or add more tasks before sending using a new lookup control as per screenshot below. Pressing this button will reveal a list of Tasks from which you can pick to link to this Task, by typing in the specific Task Number or select the relevant Task form the provided lists:
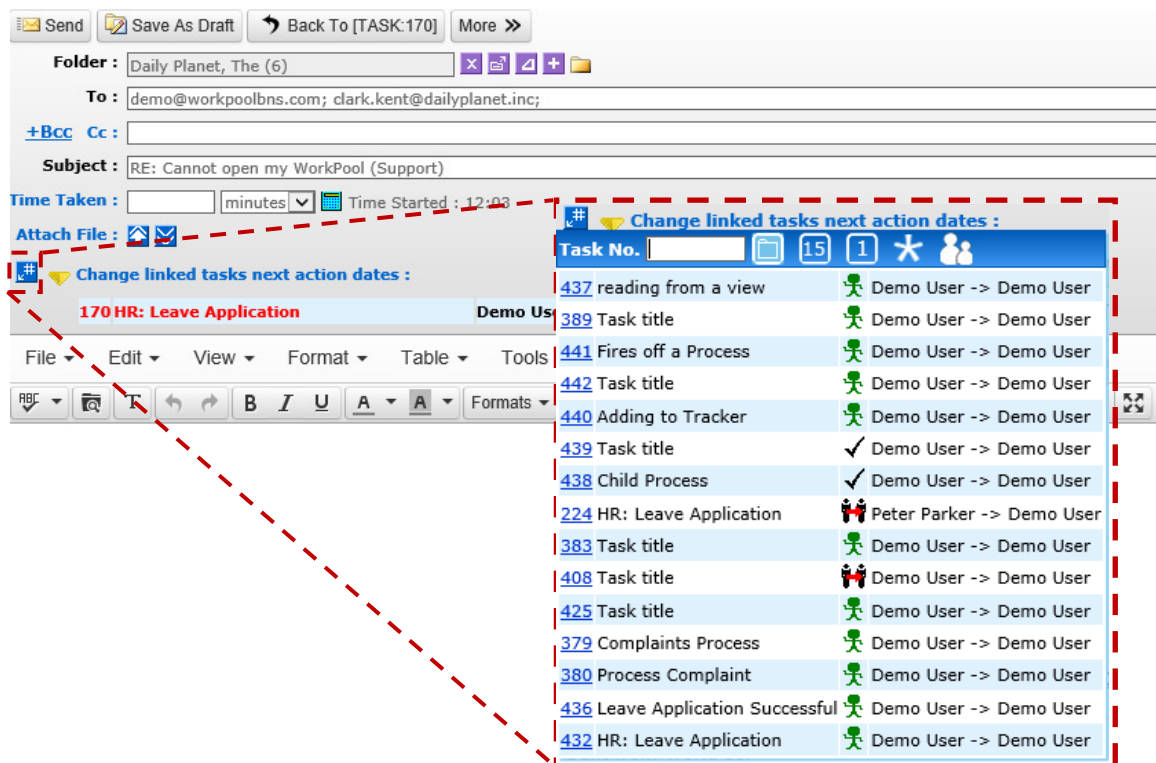
Toolbar and browse options:
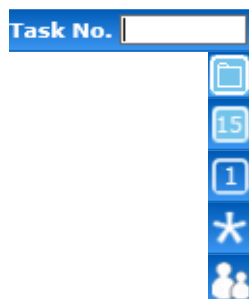
|	
Task No. [ ]	Task number link – press enter to confirm.
	List Tasks in Electronic folder that email is linked to.
	List Last 15 Tasks.
	List Tasks for Today.
	List All Tasks.
	List Managed Resources.

Once a Task has been selected it will be displayed on the email as shown below. A reminder that the list of tasks can also be collapsed (hidden) from view to allow for more space in case of writing emails on mobile devices.
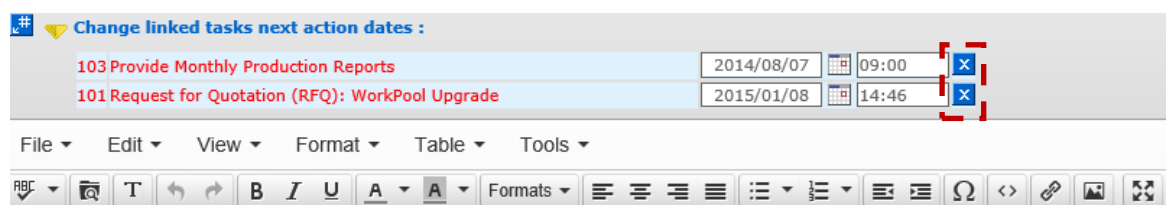
Tasks can also be removed from this list by clicking on the unlink icon indicated above.

3. New feature to resend an email "as is" (110248)

Sometimes the author of an email wants to resend an old email or create a new email to send to someone else with the exact same content. If this happens regularly they can create an email template, however if it is a once off occurrence users can now resend a message using the "Resend this message" icon added to the email message action panel. This icon is only available to the author (also called the publisher) of an email.

4. Message Template Permission Groups & Rules (105191)

Message Template Permission Groups were introduced to allow for more structure in grouping templates together as well as further enhance access control and permissions on WorkPool, to prevent potential "exploits" by users of the Message Templates to gain access to restricted View Data. In previous versions, if a system administrator was not mindful of permissions and configured a message template using expressions that accessed "restricted data", information could inadvertently be shown to users in the body of an email. In adding template permission groups to WorkPool, we have now added a utility for the WorkPool Administrator to manage this risk. The administration screens can be found under Directory Administration in the following location.

Message templates (Email or SMS) must now be linked to an Email/SMS Template Group as indicated below.
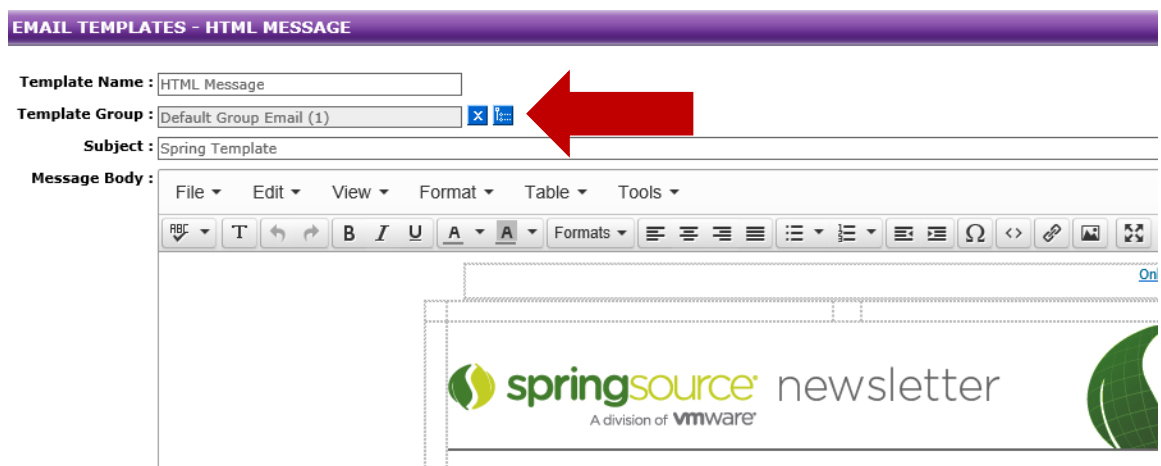
Please note: the "Template Group" is a required field and must be selected before being able to save a new template or edit an existing template.

Creating and managing the relevant Template Groups for both email and SMS is done via the respective "Manage Text Message Template Groups" or the "Manage Email Template Groups" links on the Directory Administration screen.

These Template Groups are then in turn linked to one or more Resource Groups to grant access to those users based on their roles.

Please Note: During the upgrade to version 4.7 WorkPool will automatically migrate any existing Email Templates to this new system by adding the existing Templates and all active Resources to a default "Message Templates" Resource Group as indicated above. This will ensure that all Resources retain access to the Templates that are currently in WorkPool.

Changes to the Email Template Manager (Email Composition Screen):
The Email Template Manager has also been updated to display only the email templates that a user has access to as well as grouping the templates per permission group. As indicated in the screenshot below, you will notice the email templates nested underneath the Template Group that they have been linked to (see Templates Group image).
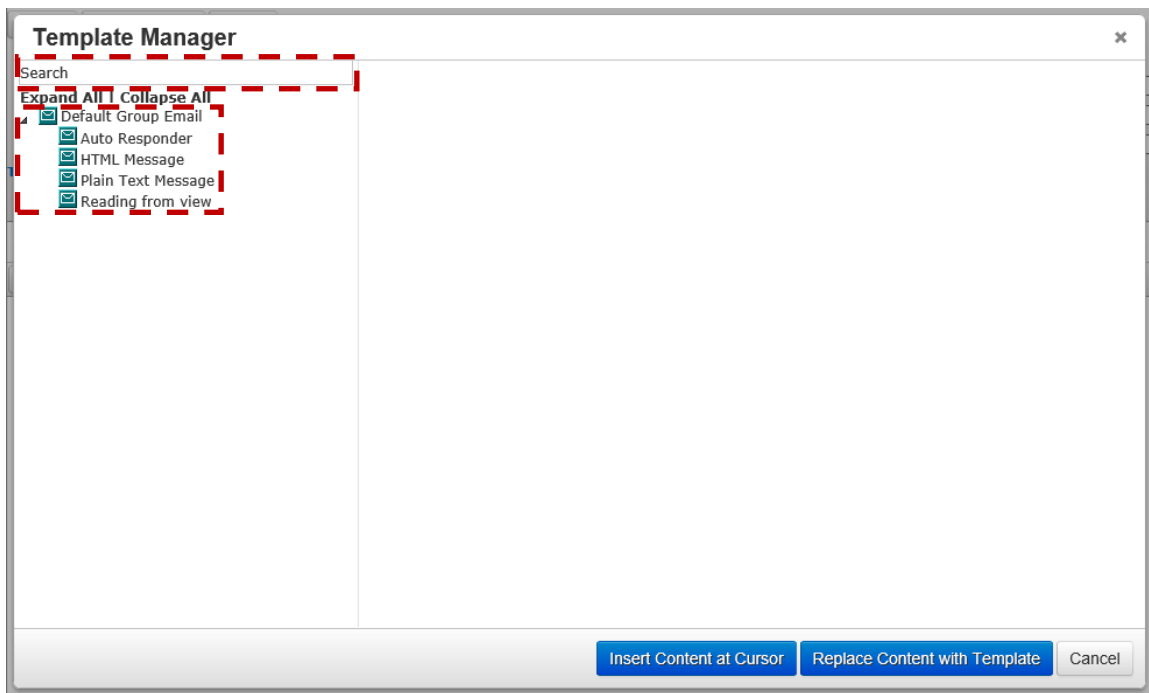
In addition to this change we have also added a search box and an "expand all" and "collapse all" links to the Template Manager control to assist the user in finding or displaying the Email Template they are looking for.

Please note: If a user is not able to see the relevant Email Template from their Template Manager the WorkPool Administrator will need to add the user to the relevant Resource Group. Adding a User to a Resource Group can be done as follows:

1. Select the "Resource Group" link on the Task Administration Screen, under the "Resource Management" Section and then select the relevant Permission Group. Once open drag the required resource/s from the "Internal Resources" block to the "Grant Access To" block and then press the save button, to commit this change to the WorkPool Server.

2. Select the Resource under the Internal Resource section on the WorkPool Administration screen and then editing the "Security and Permissions" section. Select the required permission group/s under the "Allow Access to Resource Groups for" section by using a combination of the Shift and Ctrl keyboard modifiers in conjunction with clicks from the mouse; then press the save button to submit the changes to the WorkPool Server.

5. **Updates to the Email Composer - TinyMCE component update (110249)**

To keep up with trends and improve support for various Internet browsers when composing rich/HTML-based email messages we update the composer component for this from time to time. This version of WorkPool features an update to the latest version of this component.

6. **New system setting to ignore expired Next-Actions on Tasks when sending emails (110252)**

    Keeping next action dates on tasks updated is essential to keeping commitments on tasks. As such, when you send an email from WorkPool the system will prompt you to enter a new Next Action date on any linked task with an expired next action date. This same feature also saves time as you can update next actions dates from the email screen to schedule follow ups from the same screen that you are drafting emails from. However, not all companies make use of next action dates on tasks and find this cumbersome. For this reason a new feature was added to allow the WorkPool Administrator to disable this "Next Action" rule under the System Task Properties.

    My Profile - Custom Interface Settings

    Activity Properties : ☐ Make "Time Taken" a Required Field on Activities and Messages

    ☑ Only allow future Next Action dates on tasks when sending emails

    Display Settings : ☑ Collapse Task History Details by default

    4 Limit the amount of History Items displayed on a Task to

    Task Administration - Task Properties

    Make "Time Taken" a Required Field on Activities and Messages : ☐

    Only allow future Next Action dates on tasks when sending emails : ☑

    Limit the amount of History Items displayed on a Task to : 25

    If the default system rule is set to prevent expired next actions then the user cannot disable it, however if the rule is disabled the user may add a preference for the system to prompt them to update expired next actions under their "Personal Setting" section.

7. **Changes to Text Messages and Mobile Numbers (110246)**

    a. Old mobile numbers can now be deleted from Entries (110424/110429)
        Due to the mobile number recorded on WorkPool being linked to the text messages sent from WorkPool in the past, the number could not be deleted. Due to changes made we now duplicate the number so that users can remove mobile numbers when they are no longer used, but still keep the audit trail intact.

    b. Resources can now register multiple mobile numbers (110433/110434)
        As per point above, due to mobile numbers for Resources (users) being linked to text messages like task notifications in the past, the number could not be removed and was stored in the system against the user, even if they could not see it. Now that these numbers are stored separately all the numbers linked to a resource is now visible and the user must choose at least one as the default for notifications.

    c. Sending Bulk Text Messages now create a separate message per number (110403)
        With the number being split from the message we can no longer store multiple numbers against the same message as in the past (when one message gets sent to

multiple parties) and therefore the message now gets duplicated so that there is an individual text message for each mobile number it was sent to.

d. Standard Text Message Screens updated

In line with changes mentioned above all the Text Message screens, including the queue, sending text messages, text message service administration, entry communications, etc. were all updated to incorporate these changes.

8. Minor Changes and Bug Fixes

a. (**111805**) Minor Change: The warning message that appears when a user has more than 100 emails in their inbox will now only pop up once per session or periodically, as opposed to every time the inbox screen is reloaded.

b. (**105191**) Minor Change: Expanded on rules used to populate content in Email and Text Message Templates to prevent access to inaccessible information.

c. (**105189**) Fixed Bug: Embedded images were being attached as attachments to an email in addition to being embedded to the email, under certain conditions.

d. (**105200**) Fixed Bug: The system SMTP email account details could not be saved without specifying a username and password, where a username and password have already been specified.

e. (**107767**) Fixed Bug: Keyboard shortcuts allowed unsupported rich text modifications (like bold and underline) in plain text email messages.

f. (**107839**) Fixed Bug: Deleting email messages linked to a Personal Folder did not remove all links to the email.

g. (**108246**) Fixed Bug: Deleting Email Message did not remove all of the email message content from the database under certain conditions.

h. (**108274**) Fixed Bug: An email message sent to the same email address multiple times (i.e. address repeated more than once in the To, CC or BCC fields) caused duplicate relationships in the database.

i. (**10251**) Change: Support added for additional Microsoft Email message separators.

j. (**110266**) Fixed Bug: Mailbox Rule Processor auto-reply function was not processing Task Expressions.

k. (**110548**) Fixed Bug: Mailbox Rule Processor function was not auto-linking source email to tasks/processes created.

l. (**110267**) Fixed Bug: Pressing the delete button on the keyboard while busy on one screen sometimes called an action on another, incorrect browser window/tab.

m. (**110268**) Fixed Bug: Validation of email addresses in Text Message Services (Email) was not working properly.

n. (**110338**) Change: Email "Service Start" and "Service Stop" events now recorded in System Event log. This forms part of the new Email Control panels that allow system administrators to stop and start the email sending and downloading services.

o. (**110490**) Fixed Bug: Email templates did not resolve expressions when sending emails from an Entry Group.

p. (**110805**) Fixed Bug: Email templates did not resolve Resource Expressions under certain conditions (sequence of events).

q. (**111850**) Fixed Bug: Email messages with no "From" email address did not display in the list of messages when sorted by "From" column. These messages will now display "Unknown" when no "From" details can be found.

r. (**112298**) Fixed Bug: When sending an email with duplicate email addresses in the To, CC or BCC fields, these duplicate email addresses were not filtered out i.e. support@workpool.co.za; Support@workpool.co.za were seen as two different addresses and therefore two emails were sent to that address instead of one.

s. (**117789**) Fixed Bug: External Calendar Invites were showing the "Loading ..." animation where the calendar invites were badly formatted.

t. (**117598**) Fixed Bug: The Email paging icons on the "My Email" screen were not displaying as intended.

u. (**117126**) Fixed Bug: The Delete Email button was not placed on the correct layer and hovered over other icons.

v. (**115531**) Fixed Bug: An exception would occur when trying to delete an unwanted draft that had an email as an attachment.

w. (**114796**) Fixed Bug: Certain Hyper link targets would cause the wrong window to update in Firefox and mobile browsers.

x. (**114559**) Fixed Bug: An exception was thrown when trying to save an Email Template that had a very long title.

DIRECTORY

1. **Indicators now visible on attributes linked to processes or Data Transfer services (i.e. imports/sync's) (110254)**

   Continuing with the work done previously to add link indicators to Process Definitions and Process Instance screens, we have now added link 🔗 icons to Views and View Definitions in the Directory as well. This icon will appear next to any attribute on a View that is mapped to a directory import service or a process definition. This is useful in cases where data entered by a user may be overwritten based on another service or process. Likewise, users can now see what impact a change on an attribute may have on a process's execution.

2. **New Cascading (hierarchical) Attribute Options on Views (110264)**

   The Option Attribute type was updated to introduce cascading options, i.e. browsing a hierarchy or tree of values by drilling down on options. This is explained in more detail under the **WorkPool System & Administration section** as it pertains to Processes as well.

3. **New Multi-purpose Entry Relationship screen (110265)**

   For many the Entry Relationships screen has been an underutilised or forgotten feature in WorkPool. It is however a very powerful tool as it creates a map of relationships to other entries and indicate the role they may be playing in the "big picture". Various new relationships have been introduced over the last couple of years and this screen has now been updated to list additional relationships, but also allow for user interaction to update, create new or remove existing relationships. The Entry Relationships screen can be accessed via the Entry Properties button.
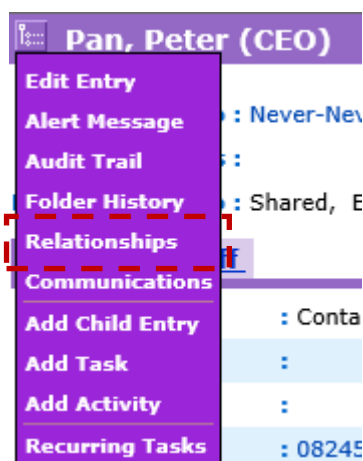
   As per the screenshot below Child Entries and Sibling Entries can be added or removed from this screen (audit trail updated accordingly). Users can also manage membership to Group Entries from this screen.

Relationships for: WORKPOOL (PTY) Ltd

Belongs to: WorkPool Collective

Sibling Entries: 2		Child Entries: 2	
WorkPool Technical Forum	x	Staff Group	x
WorkPool User Forum	x	WorkPool (South Africa)	x
Add Sibling Entry :	x 🗔 ◹ +	**Add Child Entry:**	x 🗔 ◹ +

Entry Group Membership: 2

BETA Group (Cape Town)	x
WorkPool Technical Forum	x

Add To Group :

▼ Linked to Views

Pan, Peter (CEO)	Refered By (Contact)	
Parker, Peter	Refered By (Contact)	

▼ Linked to Processes

HR: Leave Application v9.0	Linked Directory	[TASK:465]

▼ Linked to Item Categories

Supplier/Manufacturer	Coffee Bean	
Supplier/Manufacturer	Coffee Machine	

In addition to basic Entry relationships mentioned above, links to Views, Processes and Items (Supplier) can also be seen by expanding the relevant section.

4. Minor Changes and Bug Fixes

a. (**107760**) Fixed Bug: Where a String Instance contained HTML characters and this was displayed on the View Sample of the Report Design screen, it would break the result screen.

b. (**109005**) Fixed Bug: The Task number of an unrelated Task was being displayed on the Bulk Email Composition screen, where the email was being generated from a Directory report and not a Task.

c. (**118737**) Fixed Bug: Content on views containing "< >" characters did not display in the Directory Report when "display as view" is selected.

d. (**118461**) Fixed Bug: Corrected limited result set when report included views on Directory Entries that contained "< >" characters.

e. (**118030**) Fixed Bug: Ampersand '&' character in Directory Entry names caused issues with the Directory Report formulas.

f. (**117614**) Fixed Bug: The user account filter on the Directory Entry Email Tab would not display emails correctly.

g. (**116499**) Fixed Bug: "From Date" on the Directory Entry Email tab was not honouring the default time period set under the "Directory Administration" section.

h. (**113260**) Fixed Bug: The Directory Wizard's "Compare With" value box would sometimes go missing.

i. (**113141**) Fixed Bug: Resource Attribute Type not working on Directory Report

j. (**113139**) Fixed Bug: Specific Attributes were not available for selection on the Export Wizard option.

k. (**113028**) Fixed Bug: Adding a Task Attribute to an existing View Definition would not update existing Views with the new attribute.

ITEMS

1. **Minor Changes and Bug Fixes**

    a. (**115841**) Fixed Bug: Could not lookup/link Items with an apostrophe/quote in the Item name.

PROCESS MANAGEMENT

1. New Feature: Added Support for Entry Expressions on Process Flows (118692)

Until now the "Entry Expression" on a Flow was largely ignored beyond starting a Process from a specific Entry and could not be set programmatically. By adding support to the Process Engine and expression resolver, to identify Entry Attributes on a Process, or linked Entry View/s, we now allow the linking of new Flows (Process bound Tasks) or Sub-processes to other Entry Folders.

The value of the expression will be evaluated at time of Task or Sub-process creation, should the expression be invalid or unresolvable at this point the Task or Sub-process will remain linked to the original Entry that the current process instance is linked to. Typical audit trail and escalation routines have also been added to ensure that user actions as well as issues are noted and escalated for resolution, where applicable.

Currently the "Entry Expression" box can be populated in the following two ways:

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a. Reading the populated value from an Attribute Instance on the Process, via the use of an expression such as ${client_spouse} but do note that the attribute type (client_spouse) must be of type "Directory Entry".

b. Reading an Entry Attribute on a View, linked to the Entry that the Process Instance is linked to, such as ${view(Business).contactPerson} where View attribute "Contact Person" is an attribute of type "Directory Entry".

As with all other similar features the new "Entry Expression" will be:

a. Exportable with our standard "Export Process" feature, allowing the WorkPool Administrator to export and share his or her Process Definition with other WorkPool Administrators.

b. Editable via our Graphical Process Designer (under the "More" button on the Flow Edit screen), and while this will make the use of this feature far easier to use the Process Designer is still required to have a basic knowledge of expressions.

2. **Revised relationships between Tasks, Process Definitions, Process Instances and Attribute Instances (105192)**

To improve performance and allow for new caching options the underlying database structure was changed with regard to the abovementioned database entities. These changes should boost performance for users with large amounts of processes in their system. As these changes were made to underlying (back-end) code the front-end screens look, feel and functionality remain unchanged, however changes were substantial.

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3. **New Cascading (hierarchical) Attribute Options on Process Definitions (110264)**

The Option Attribute type was updated to introduce cascading options, i.e. browsing a hierarchy or tree of values by drilling down on options. This is explained in more detail under the **WorkPool System & Administration section** as it pertains to Processes as well.

4. **Minor Changes and Bug Fixes**

   a. (**105250**) Fixed Bug: The feature to copy attribute values directly from a parent process to a child process instance assumed that the two attribute types (one on the parent Process and the other on the child Process) to be the same. In cases where these two attributes were of a different type i.e. address vs. cell number, it would cause an exception in WorkPool. This has now been changed so that WorkPool records the reason for the issue in the Process History audit notes.

   b. (**108765**) Fixed Bug: Multiple users completing more than one task on the same process simultaneously can cause a process to stop if the tasks are part of the same loop or fork/join section. The chance of this issue occurring prior to this bug fix was miniscule, however a small change was made to the Process Engine to prevent this.

   c. (**110255**) Change: Show correct (active) process name, code and version in Process Designer and Flow Add/Edit Screens.

   d. (**110260**) Change: Task View screen now reads and displays values for linked attributes even if the value stored on the process is still empty.

   e. (**112273**) Fixed Bug: Linked, Read Only attributes on a Processes showed the current values instead of original values.

   f. (**118549**) Fixed Bug: Audit Note on Process Flow displays "null" in the Task note of a completed Task.

   g. (**117821**) Fixed Bug: Setting the add/subtract value on the Process Flow "Duration" to 0 for calculated dates caused loses of information.

   h. (**114592**) Fixed Bug: The calculated duration for the date/time options on the Flow Edit screens were no longer working.

   i. (**114298**) Fixed Bug: Detailed Process Report results in an exception being thrown when sorting the results.

   j. (**113091**) Fixed Bug: Updated the Visual Process Editor to be able to set a second first flow transition.

TASKS AND ACTIVITIES

1. **"Show Task" screen updated with floating header panel and new reload button (105190)**

   Keeping in line with our plans to update the look and feel of the Task screens, we have made another update to the "floating Task action panel". This floating panel now shows the entire task heading, task action buttons as well as the task importance, sensitivity and status indicators.

   These will remain visible even if the user scrolls down. In addition, the Task reload/refresh feature has been moved from the task number (clicking on the task number in the past would reload the page) to a new button located next to the Task number – its function remains the same.

2. **Changes to the "Participants" section on the "Show Task" screen and New Resource Selector component (105195)**

   The Participant section on the Show Task screen was updated to allow users to view additional information (in the case of Resource Groups) or take action to reassign tasks and change ownership of tasks (administrators only) directly from this screen. The names next to the "Assigned To" and the "Requested By" labels will now provide hyperlinks or display popups with additional information.

   The Task Owner can now click on the name of the resource (Assigned to or Requested by) to reassign a Task, directly from the Task View screen i.e. you no longer need to go to the Task Edit Screen to reassign a Task to another resource.

   In the case of a Task being assigned to a Resource Group: Hovering over the Group Name will now show the Manager, Quality Assurer as well as members of the Resource Group in a panel similar to that used when hovering over a Task on the Task Screens. Depending on the composition of a Group, that a Task is assigned to, the following visual indicators or colour codes are used to assist you:

Task Assigned to a single Internal or External Resource - no background colour change.	**Participants** Assigned to : Demo User Requested By : Demo User Directory Entry : 📁 WORKPOOL (PTY) Ltd
Task assigned to a Group with no warning messages - blue colour background.	**Participants** Assigned to : HR: Leave Applications Requested By : Demo User Directory Entry : 📁 WORKPOOL (PTY) Ltd
Task Assigned to a Group without any Members, meaning no Resources will attend to the Task - red colour background.	**Participants** Assigned to : Empty Group Requested By : Demo User Directory Entry : 📁 WORKPOOL (PTY) Ltd
Task assigned to an inactive Group, meaning no Resources will act on the Task - grey colour background.	**Participants** Assigned to : Deactivated Group Requested By : Demo User Directory Entry : 📁 WORKPOOL (PTY) Ltd

3. **Changes to Task Add and Edit screens to simplify access to Custom Task lists (110253)**

    The "Add Task to Custom List" 🗒 component was updated on both the Add Task as well as the Edit Task Screens to use the same component that is found on the Task View screen. This change should simplify managing links to custom lists from these screens and standardise on one component on all screens.

4. **New feature on Task Context Menu to reassign or transfer task/s to another resource (105197)**

    A new option was added to the Task Context menu (that pops up when you drag tasks on the "My Tasks" screens) to allow a Task Owner to transfer ownership or reassign a task (or tasks) from the current resource to another Internal Resource. All of this can be done directly from the "My Tasks" screen, without having to open or edit the Task or navigate to another page. As with all other Task-related actions on the context menu, actions can be performed in bulk (more than one task at the same time) by simply selecting the tick boxes next to the Tasks you wish to apply this bulk action to.

Update Next Action
Add to Task List
Update Due Date
Reassign Task/s
Transfer Task/s
Update Priority

Demo User
Joe Smith
Peter Parker
Update 1 Task

Update Next Action
Add to Task List
Update Due Date
Reassign Task/s
Transfer Task/s
Update Priority

Demo User
Joe Smith
Peter Parker
Update 1 Task
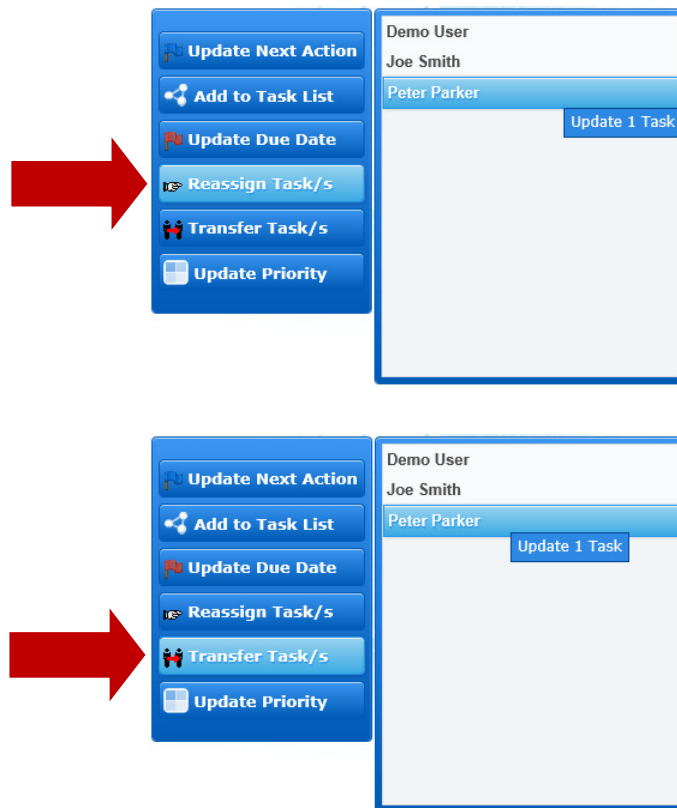
5. Minor Changes and Bug Fixes

a. (**108712**) Fixed Bug: When a user looked at the Week View (7-day) Task list of another resource from the "Task List for other Resources" screen, their own Calendar Events would be displayed on this list instead of the user who's list they were looking at – assuming the filter was enabled for this.

b. (**105201**) Fixed Bug: Time Spent value under Metrics panel included time for external parties on calendar events.

c. (**108176**) Fixed Bug: Re-aligned hyperlink (the area you to click on to navigate to another page) for Task Administration icon in Internet Explorer on the "My Tasks" View screens.

d. (**111568**) Change: If a recurring task is linked to a process definition version that has since been updated to a new version, the Recurring Task screen will now automatically update itself to link to the latest version when a user makes changes to the recurring task.

e. (**110270**) Fixed Bug: The "Due in" column was displaying an incorrect duration on "Resource Task Status" report.

f. (**110401**) Change: The Show Task screen will now indicate expired Next Action dates with a red background to prompt the resource to update it (bottom of screen, when adding activities).

g. (**110473**) Fixed Bug: Spelling mistake "Actual Time Spend" on the Task Classification Report's task list under Task Administration.

h. (**118735**) Fixed Bug: Stopped duplicate Task notification (emails) when a Process was started from recurring Task.

i. (**118259**) Fixed Bug: The "Select All tasks" tick box in a filtered list of Tasks was setting the next action dates for **ALL** tasks.

j. (**118225**) Fixed Bug: Active Task was reflected as 100% complete on status bar where the Task was assigned to a Group.

k. (**116628**) Fixed Bug: When a Task that was linked to additional custom lists was updated, the Task was removed from these custom lists.

l. (**115935**) Fixed Bug: The "Inform additional resource" field was not being cleared automatically when escalating Task.

m. (**115811**) Fixed Bug: The down arrow did not scroll to the bottom of the page when using an iPad.

n. (**115044**) Fixed Bug: Activity types were not displaying correctly in Chrome.

WORKPOOL SYSTEM ADMINISTRATION

1. **New Component for managing file uploads and hyperlinks, including new drag-and-drop feature (105188)**

WorkPool now allows for uploading of multiple files (where allowed) at the same time, OR with a new drag-and-drop feature! Yes we thought you might like this one☺. The File Upload button component has been rewritten and new functionality added as well as configuration options that will allow users to control the type of documents attached on Processes or Views.

The upload control has the following options and works as follows:

Pressing the new Upload Documents button ⬆ will now open directly into the File Upload window of your Browser/Operating System as seen below, allowing you to easily navigate to the storage location of the desired file, in the same manner you would with other programs.
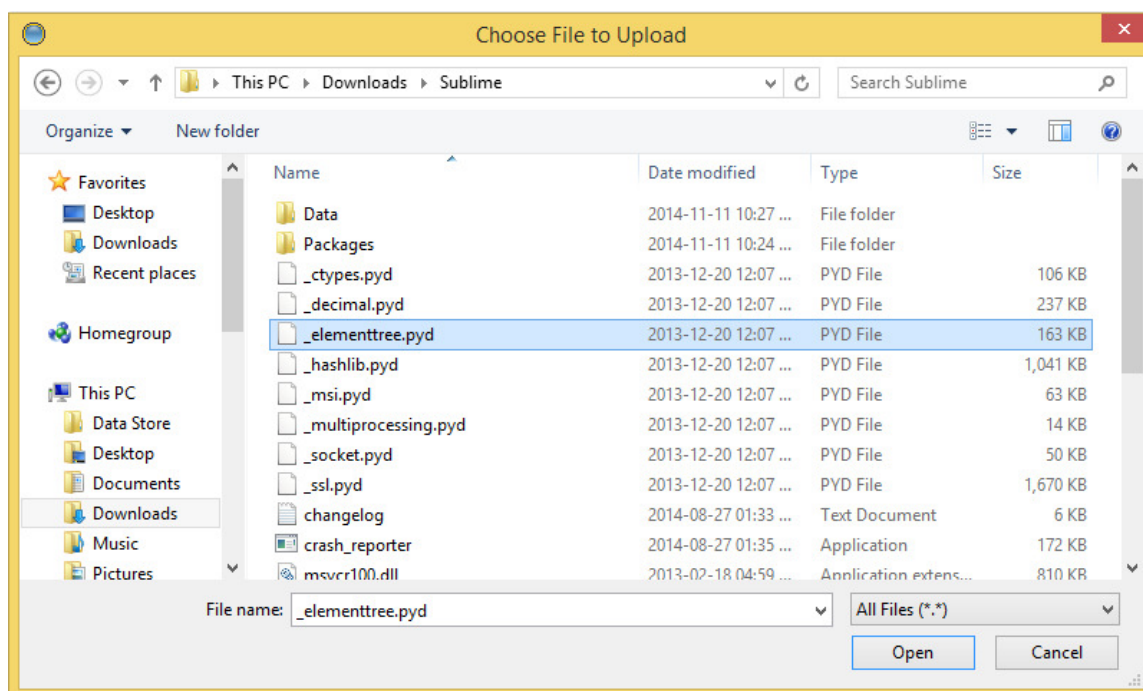
Using a combination of the Shift and Ctrl buttons (Windows) as explained below (or the Command key on Apple Mac), you can now select up to 10 files to upload onto for example an Activity or an Email in one action. **Please note:** this new feature will **NOT** override existing business rules or file limitations in WorkPool i.e. you can still only attach one file onto a Task from the Task edit screen.
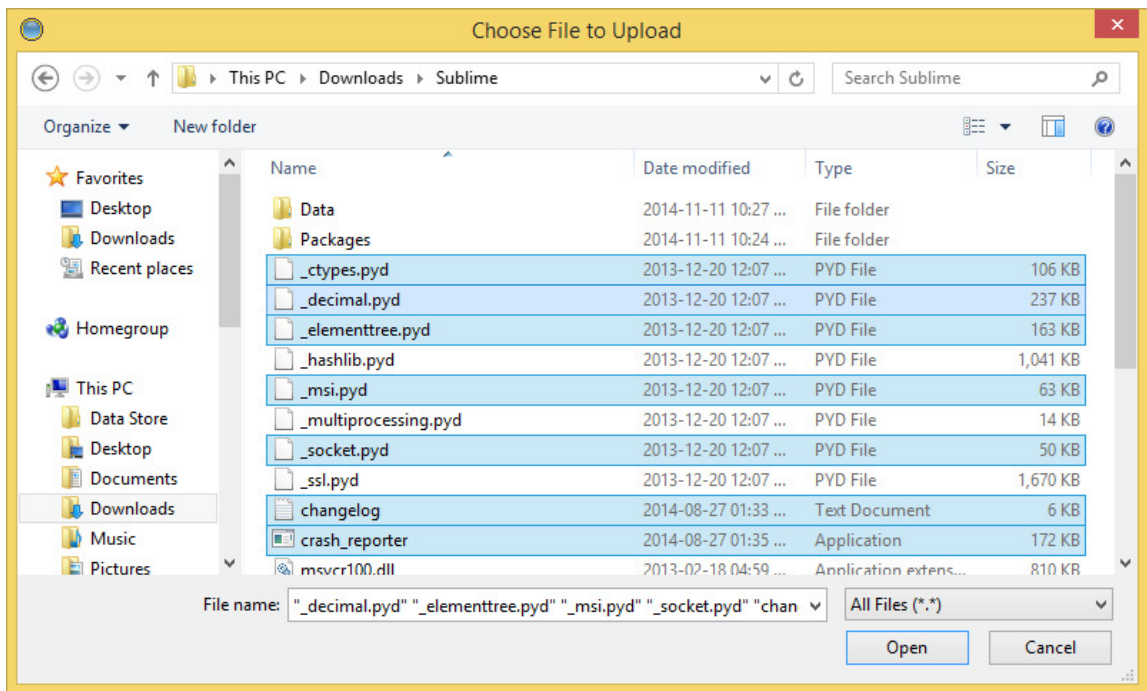
As per the window above:

1.) Click on the first file you would like to upload.

2.) Then press and hold Ctrl and click on each file you want to upload, or

3.) Press and hold the Shift button and click on the last file you wish to upload to upload a range.

Please Note: The maximum amount of files that can be attached at present is **10**.

As an alternative to above, you can now also drag files (single or multiple) onto a designated "drop zone" area on the WorkPool Task, Activity or Email composition screens to upload these files automatically to the system.
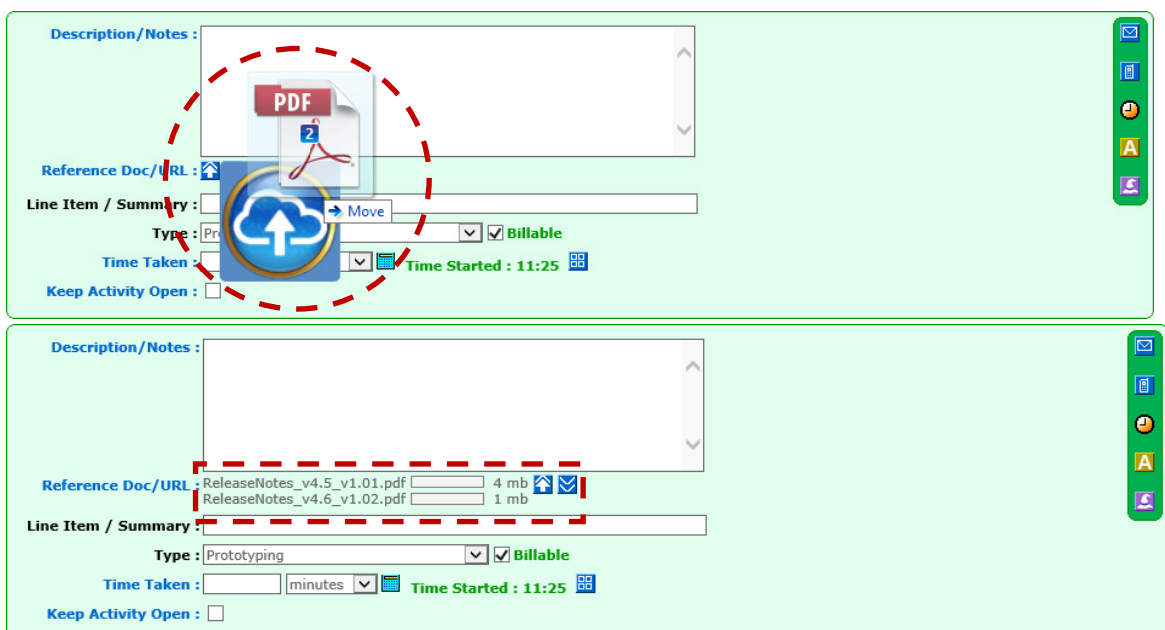
Once the upload of the files begins, WorkPool will display a progress bar next to each document that is still uploading to WorkPool, as shown and highlighted in the image above.

The More Documents ☑ button (previously only found on email related screens) will now be present on most other screens where files can be uploaded and open a new advanced control to allow for quick access to existing documents in WorkPool. This new standard combines the features of the old "More Documents" control and some of the old "Documents Upload" control.

The "More Documents" control has been broken up into three tabs, not all of them visible at all times, which allow the user to link:

1.) Related Documents that have already been attached to WorkPool via Tasks, Processes or Views on Entries that the Task/s or Email/s have been linked to.

2.) Files and Templates from the WorkPool Files Section (document versioning module).

3.) The option to add a URL or Link to a website or file.
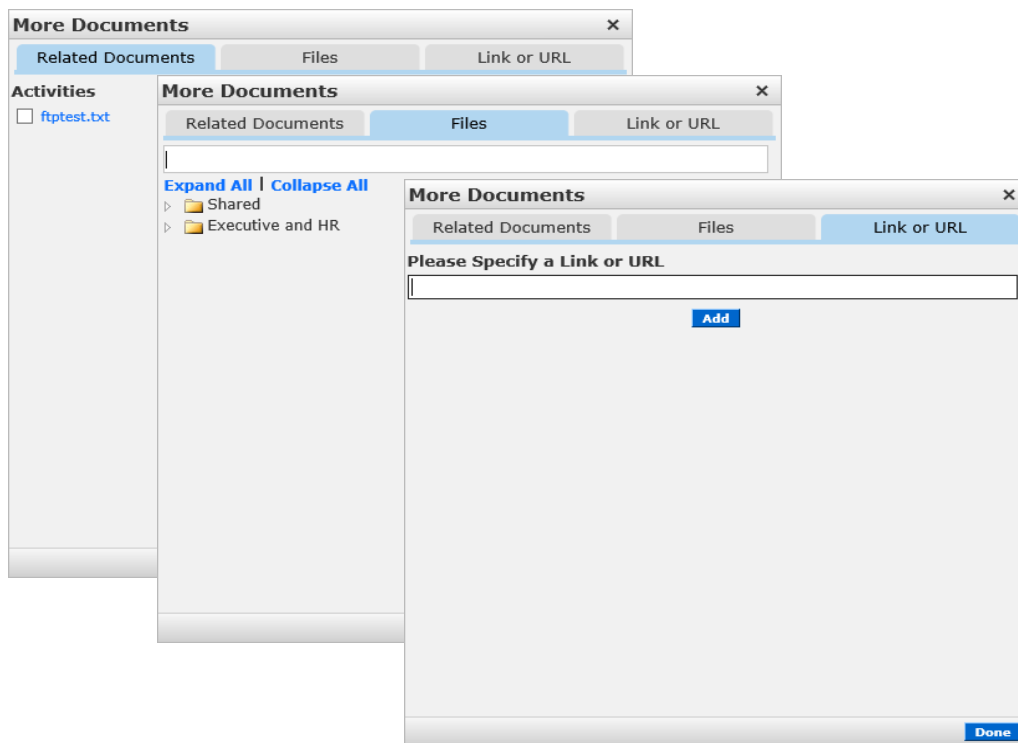
Any document that is attached to an Activity, Email, Task etc. via the "More Documents" control will immediately disappear from the list of available documents shown on the control so as to prevent the user form attaching the same document multiple times. For instance placing a tick in the tick box next to the "ftptest.txt" document on the Related Documents Tab will make it vanish from that tab and be shown as an attachment on the Activity, Email or Task you are trying to attach the document to.

It is also important to note that these tabs (Related Documents, Files and Link or URL) are contextual and will only be visible where there are documents available or relevant business

rules to make the tab visible. As an example: As per a recent improvement to the URL attribute type for Views and Processes, the URL attribute can now be configured to only accept uploaded documents (as opposed to links or comments). If this option is activated then user will be prompted to upload a document into WorkPool and therefore the "Link or URL" Tab will not be visible as this will not be allowed according to this rule.

An additional benefit of these changes to the "File Upload" component is that users can now take and attach photos from their mobile phone or table and attach them directly to tasks, activities, emails, views or anywhere the file upload button is visible!

Users can access the camera on a smart device directly from the file upload button and even track upload progress with an on screen status indicator.

This change will affect the following screens in WorkPool:
- Tasks and Activities
    - Add Task Screen
    - Edit Task Screen
    - View Task Screen (add Activity)
    - Add New Activity
    - Edit Activity
- Email
    - Email Composition Screen
- Calendar
    - Add Event Screen
    - Edit Event Screen

- Items
    - Add Category Screen
    - Edit Category Screen
    - Add Location Screen
    - Edit Location Screen
    - Add Item Screen
    - Edit Item Screen
- Files
    - Add Document
    - Edit Document
- Intranet Home
    - Add Announcement
    - Edit Announcement

2. **File Transfer Protocol (FTP) option for transferring of files removed - no longer used (105187)**

As of this release, files (attachments) can only be viewed and downloaded from the WorkPool server using HTTP/S. FTP is no longer supported as it is no longer considered secure and no longer used by our clients.

3. **File Upload Service for Integration Services [105030]**

WorkPool can now be configured under the System Administration section to allow other services, applications and customer websites to upload and publish files to the WorkPool server as part of starting tasks, processes or updating Views. This forms part of the WorkPool API facility, used for integration services, however the configuration is done on the standard WorkPool System Administration interface. A File Transfer UID Token must be passed with all requests for WorkPool to allow the upload. File Upload Size restrictions still apply.

4. **"Calculate Time" function enhanced with new rules and options to prevent "lost time" (110263) Revision: Auto Calculate and warning/prompt to prevent missing time on emails (114040)**

Users often forget to enter time spent into the Time Taken field, or lose time when they open up an old draft (email) or activity to continue working on it. By not paying attention to this field they may inadvertently lose time previously recorded or new time spent on

changes. To compensate for this, WorkPool will now monitor this field and when someone presses the "Save as Draft" or "Send" button on an email, WorkPool will check to verify if the amount of time in the "Time Taken" field includes the time the user has spent on changes. If it does not, a message will appear asking the user what they want to do. The user can then pick one of three available options: 1) add the extra time to the existing/old "time taken" value, 2) ignore the additional time spent on this screen or 3) go back to the screen to fix it manually.
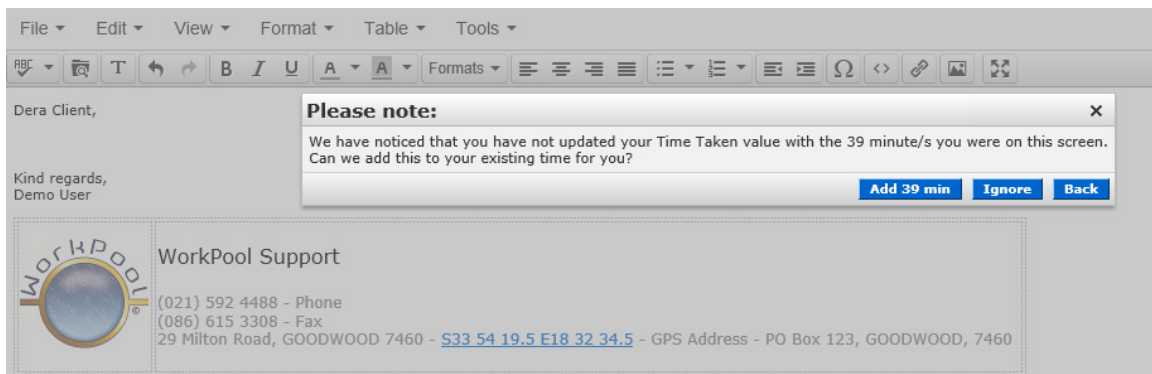
Before this change WorkPool only calculated the time from when the page was loaded/opened and did not take any additional time already spent into account when re-calculating the time. Now, if an activity or email draft already has a value in the "time taken" field, the calculate button will add the new "time taken" value to the already existing (old) "time taken" value.

The "Task Properties" screen, located under the WorkPool Task Administration Screen has also been updated with a control to set the behaviour of this new feature and will behave according to one of the three available options – the default being "Automatically add time" so as to cause the minimum amount of interruption to the user.
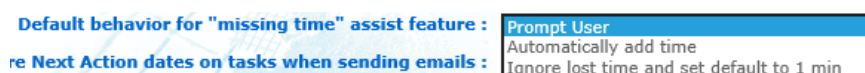
The settings can be changed (for all users) by a WorkPool Administrator at any point and will behave in one of the following three manners:

1. Prompt User
   This option will always ask the user if the time must be updated, as indicated on the first screenshot of this section. The user will then have the options to **add** the missing time, **ignore** the missing time or to go **back** and make a manual change to the time.
2. Automatically add time (the default)
   This option will automatically update the time on the email to include the missing time, as in this example an additional 39 minutes would be added to the time already recorder on this email.
3. Ignore lost time and set default to 1 min

This option is ideal for businesses that do not make use of WorkPool's time logging features and want to get past this step with the minimal amount of fuss. As per the title, WorkPool will automatically set the time taken on an email to 1 minute when sending, regardless of the amount of time that the user actually spent composing the message.
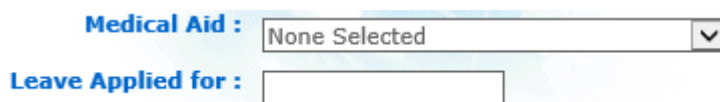
5. **New Cascading Attribute Options on Views and Processes (110264)**

Until now the Option attribute type, used on Views and in Processes, would display a list of options to a user, either as a dropdown list (single select) or a menu of options (multi-select). The option list was always one dimensional, i.e. the list options had no structure and would always show all the options below each other in a single list. To cater for situations where the structure of options play a role in the selection of a value/s, the Option attribute will now allow users to create and navigate a tree of options based on groups and sub groups. E.g. instead of listing all the cities in a country by name, you can now group them together by province/state and users can browse and first select the province and then the city, rather than scrolling through hundreds of values. If the user is looking for a single value, or wants to select multiple values, the screen will now adapt automatically to show the options available based on the groupings created. This "cascading" functionality will appear automatically when a system administrator configures sub-options for attribute options.

Depending on whether the Option Attribute allows for a single selection or multi-selection the screen will change and work as follows:
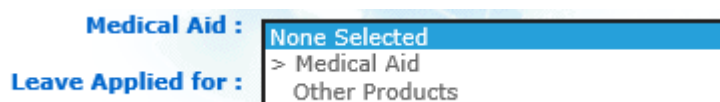
Single Selection Option Attributes:

Select an option by clicking on the dropdown box.
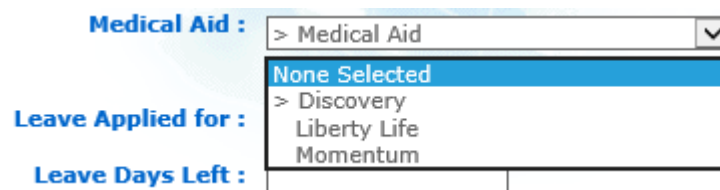
Options will be listed, with option groups indicated with by a '>', click on the option group to get a new list of sub items as per the "Medical Aid" option below.

A new list appears below the group name with items and more sub-groups to choose from.

This process (where a new dropdown with set values becomes available) repeats until the user has reached the lowest level or selected the final value.

This list is dynamic and can go down multiple levels (as many as configured). Once the final selection has been made the field will lock the value, as per below.

You can undo a selection by clicking anywhere on the "locked in" value box shown above, at which point any of the cascading option drop down boxes can be changed.
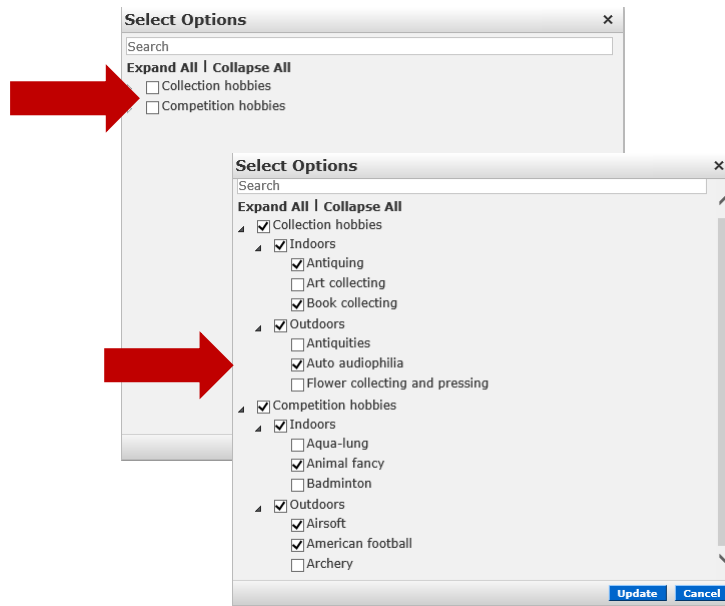

Multiple Selection Option Attributes:

To make a selection of multiple option attributes, click on the "Option property" button found on the Edit View screen, as highlighted below.

The button will open up a control window which will allow you to expand and select multiple options from the cascade option attribute list as seen below.

Once you have selected the desired option attribute/s as shown above you can submit these selections by pressing the "Update" button. Once updated the selected option attributes will be displayed to you on the Edit View screen shown below. These selected option attributes can be updated by clicking on the 🔡 "Option property" button or removed by clicking on the ❌ "Remove" button as indicated below.

Once the desired multiple option attributes have been selected the View must be saved to update the View as shown below.

Managing Cascading Attribute Option values:

As mentioned above, WorkPool will automatically adapt the interface depending on whether an option is a single dimensional list or contains cascading options. Configuring cascading options is quite easy and can be done on both View Definitions and Process Definitions under the standard Attribute Option maintenance screens. Using a View Definition as an example: From the "View Definition Administration" screen select the View you wish to edit and then create a new Option Attribute or use an existing Option Attribute on the View.

Select the "Option" link to access the "Attribute Option" screen

Add new options using the "Create New Option" button and specifying the parent option, or change an existing option to assign it to a new group.

HINT: Start at the bottom of the cascading list i.e. the last option that will be selected and work your way up the tree. The top most options will NOT have a parent value set, these will be the first values to be seen and selected by the user when selecting an option from the cascading option.

Summary breakdown of system changes:

a. (108912/110366) Special components to allow for selection of single and multi-select options.

b. (**110363**) Add support for Cascading Options on Process Definitions (XML)
c. (**110365**) Add support for Cascading Options on View Definitions (XML)
d. (**110364**) Add support for Cascading Options on the Process Designer
e. (**110368/110369**) Add support for normal Options and Cascading Options in Imports and Exports
f. (**110370**) Add support for Cascading Options in Directory Reports (and Wizard)
g. (**110367**) Support for Cascading Options on Message Templates

6. **General clean-up to remove unused pages, styles and scripts (105162)**

As part of the recent updates to the look and feel of a number of the WorkPool screens and components, we performed some housekeeping to remove unused images, pages, scripts and styles from WorkPool. This "spring cleaning" should have no effect on WorkPool users as elements removed are no longer in use.

7. **112763 New Feature: Bugs and related issues resolved after migrating to Java8.**

As part of our efforts to continuously update and improve WorkPool, we have updated and migrated WorkPool to Java 8. This is a "behind the scenes" update that will not affect WorkPool users directly

8. **136266 New Feature: Prevent repeated use of passwords (for last 12 passwords)**

When this feature is enabled, WorkPool will remember the last 12 passwords used previously by the user and will prevent these same passwords from being used repeatedly.

When activated, this feature is enable for **ALL** internal resources in WorkPool but the list of remembered passwords are applied per user, so that each user has their own "last 12 passwords used" list. Also note that this policy does not restrict the WorkPool administrator when resetting a password for a resource i.e. when a password has been forgotten.

9. **Minor Changes and Bug Fixes**

   a. (**105432**) Minor Change: Adding Support for Internet Explorer 11 to the Login Screen. Support for IE11 has now been adopted officially and as such the unsupported browser warning on the login page will no longer show when using Internet Explorer 11.
   b. (**105193**) Fixed Bug: An "Invalid email address" could be configured for a Resource under the System Administration section. We now enforce stricter rules on what is allowed as a valid email address and what is not.
   c. (**110262**) Change: System Event log now records "Migration" Events to track system software upgrades.
   d. (**112620**) Bug Fix: The File Upload Component would under certain conditions allow access to restricted content.
   e. (**118266**) Bug Fix: The "Next Occurrence" date and history for the JDBC data sources was not being updated where connection timed out.
   f. (**115736**) Bug Fix: Internal Resource retained membership to resource groups after the account was deactivated.
   g. (**114450**) Bug Fix: Attachments did not show and File selection dialog was reversed when browsing More Documents.
   h. (**114367**) Bug Fix: Incorrect Task Priority checkboxes displayed for Email Task Notifications on Resource View.
   i. (**114131**) Bug Fix: Bulk Task Re-assign screen "Task will be linked to" resource was not working.
   j. (**114037**) Bug Fix: User was unable to remove a Mobile number from a Mobile Number attribute once populated.
   k. (**113862**) Bug Fix: Note modified date was not updating when modifying notes in "My Notebook".
   l. (**112794**) Bug Fix: The Resource Selector on the Task Classification View under My Tasks was causing an issue.