WORKPOOL RELEASE NOTES

WorkPool Version	:	**5.02.x**	Internal Build Date	:	**23 January 2018**
Release/Batch Number	:	**156845**	Notes Prepared By	:	**Marius Botha**
			Revised v5.02.10	:	*20 September 2018*

Summary of Modules / Components Affected:

Module Changed/Affected	Significance / Effort
Calendar	Minor
Communications (Email & SMS/Text Message)	Major
Dashboard / Intranet Home	None
Directory	None
Files	None
Items	None
Process Management	Minor
Tasks & Activities	Minor
WorkPool System Administration	None
WorkPool Plug-ins (Add-ons)	Major

Annexure: Known Issues

Important Actions to take before and after upgrade:

1. **This update will migrate your system SMTP account (if any) to the new format to match the features incorporated for group sending. If your SMTP account is currently disabled it will not be migrated and will be removed. All other details will be migrated to the new structure.**

Important Changes affecting your WorkPool usage and content:

1. **Changes to line breaks in WorkPool Email Composer (From version 5.02.09)**

   For the most part, HTML emails have replaced plain text emails as the norm. The multitude of email clients and web-based email services, combined with different browsers such as Chrome, Firefox and Internet Explorer make it increasingly difficult to display content in exactly the same way for all users. The HTML standard distinguishes between paragraphs and line breaks when displaying content, however each editor has its own way of dealing with content and defaults that apply. Apart from line spacing, the use of paragraphs and line breaks also plays a significant role when displaying formatted content such as bullets, numbering and indentations. Without enforcing more structure and compliance to the HTML standard one runs the risk of emails being badly formatted with mixed fonts, different sizes, bullets and numbering not working as

expected and as a result the content received by other parties not looking the way it was intended. AS of version 5.02.09 we have now standardized on using line breaks and paragraph breaks in line with the HTML standard. This will affect all signatures and email templates configured in an HTML format. See the Annexures section for more details or contact support@workpool.co.za for more details.

CHANGE LOG DETAILS

CALENDAR

1. **No major changes or improvements**

2. **Minor Changes and Bug Fixes**

    1. (**158640**) Fixed Bug: Cannot drag-and-drop Calendar feed labels to change order. Dragging and dropping of Calendar feeds to change their order is not functioning as expected. Instead all the feeds shift down when trying to drag a feed up or down.

3. **Additional Changes and Bug Fixes as part of updates**

    1. [TASK:164182] - Reminder value not being copied when duplicating Calendar Event using "Ctrl + Drag" feature.
    2. [TASK:163518] - Event time changes from Outlook does not update WorkPool calendar events.
    3. [TASK:167891] - Accepting Calendar Invite via email causes internal server error if attendee has no email address.
    4. [TASK:166968] - Quick add Calendar Event does not support all characters.
    5. [TASK:164989] - Title of a private task (not accessible) is visible on Calendar Events you are invited to.
    6. [TASK 157174] - Accepting calendar events via email in WorkPool not working as expected.
    7. [TASK:168088] -Internal Resource cannot accept Calendar Invitation from another Resource sent via email.
    8. [TASK:169436] – Item Name displayed as "null" in the Calendar Event Popup displayed for an Item's Feed.
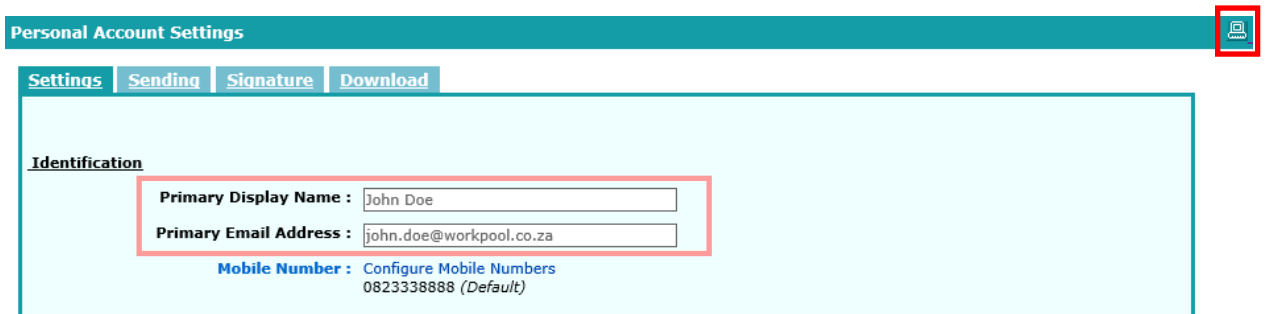
COMMUNICATIONS (EMAIL & SMS/TEXT MESSAGE)

1. Introduction of Multiple Sending Profiles (156072/157117)

In the case of service centres where several people have a joined responsibility to attend incoming requests, or where a single user may be responsible to fulfil multiple roles and attend and respond to email communications received on multiple accounts there is a need to send email communication from WorkPool "on behalf of" another party or group. A new feature was introduced to allow users to choose a "From" profile when composing an email message, assuming they have more than one configured on the system. There are 3 types of sending profiles namely:

a. **Personal Sending Profile** – A user can create one or more sending accounts (SMTP accounts) to send email communications. These would be configured and maintained by the users themselves. If a user has a mailbox configured on WorkPool 5.1 the mailbox will automatically be migrated and split into a download and a sending profile. A user can define custom stationary for each sending profile and/or default stationary for his/her account.

b. **Group Sending Profile** – A system administrator can create a sending group and plug users into the group to grant them permission to send as a group (not to be confused with a distribution group). A user can belong to none or multiple groups. A group can have a signature template configured for the group.

c. **System Sending Profile** – A system administrator can configure a single system SMTP account for use by all users and sub systems, e.g. in case users do not have mailboxes configured on the system but would like to send emails, or back-end sending services are required (e.g. notifications and email to text message communications).

Configuration of Personal Sending Accounts

A user's personal/primary email address and display name will still be configurable under the Personal Account Settings under the email module, and is significant in the suggestions WorkPool will make in terms of the sending profile to use when replying on email messages.

Click on the "Sending" tab to view, add or delete sending profiles as well as indicate the default profile. Click on the Email Display Name to edit a record (take note that this is the display name that will be used when sending emails).

Take note that the "**Download**" tab now contains the mailbox download details only and the "**Signature**" tab is where a user can specify their default signature – if any.

Configuration of Group and System Sending Accounts

An "Email Sending Configuration" link has been added to the Email Module Administration section to administer group accounts and the system account.

This list will show both Group accounts and the System SMTP account, if any, as they are very similar in nature except a Group account has a list of specific users linked to it, where a system account is by default available to everyone.

A group account can be configured as follows (note list of resources allowed as senders). An email template can also be configured as a Signature Template. If the signature contains expressions such as inserting the name of the user one could use the same signature or stationary for all the users in the group therefore removing the need to maintain this per user.

Selecting appropriate sending profile when composing/sending an email

In the event of a user having access to more than one sending account the email composer screen will update automatically to insert a new "FROM" field. This will only be visible if a user has more than one sending account option.

Click on the list to see and then change the sending account to use. WorkPool will automatically insert (or replace) the signature to the new account if possible. In a browser-based environment, where other plugins dictate how content is formatted, it isn't always possible to find and replace the content and as such a user may be required to delete the original signature if both were inserted.
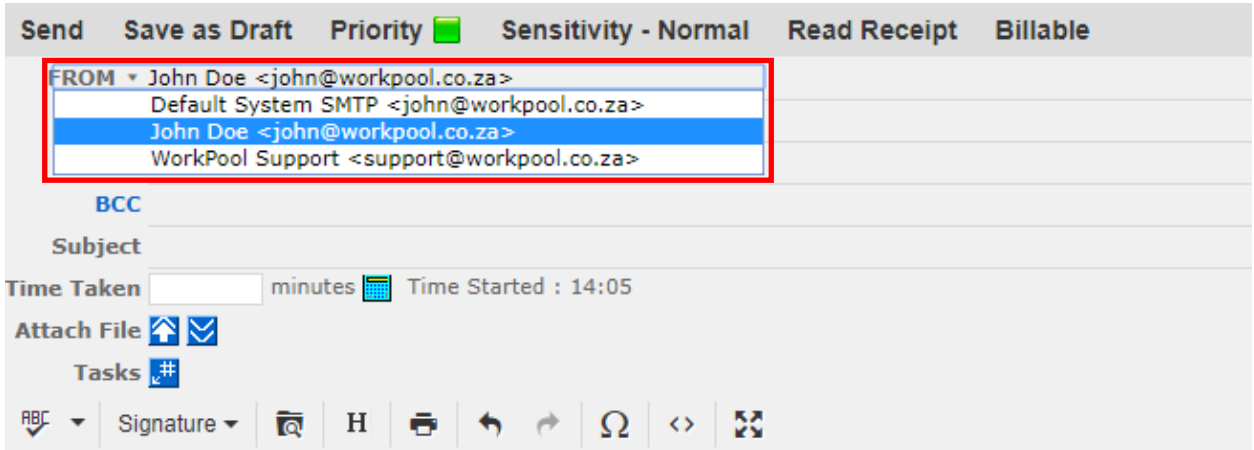
2. Email composition screen updated and signature button added (156185/156891/157118)

A new Signature button was added to allow a user to insert/change between signature options available to them. As explained above, it isn't always possible to detect and replace a current signature. We have also updated the email composer plugin we use (TinyMCE) to the latest version.
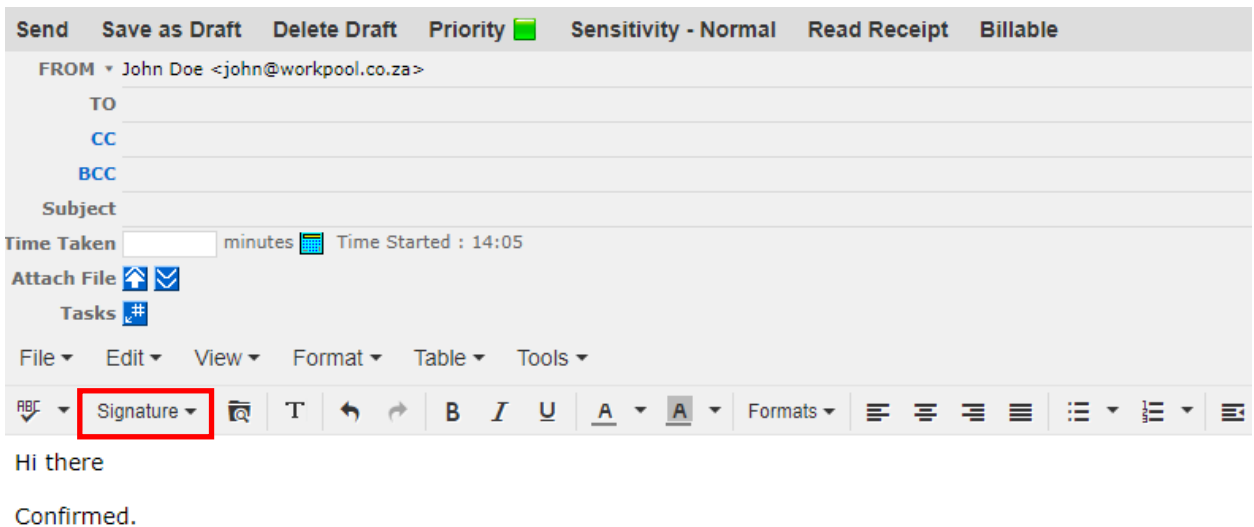
3. Implementing Auto-Save functionality

A user can now enable an "auto save" feature on their profile and specify a time limit for WorkPool to save the content of their email to the server while they are composing an email which is useful in case they lose connectivity or to prevent their browser from timing out and losing the content of the email. This feature may result in additional draft messages being created in case e.g. a user clicked to write a new email, forward or reply to an email and then change their mind.

4. **Creating New Rules to determine best sending account to use when sending emails (160268)**

Assuming a user is allowed to send emails (a sending account has been configured or is accessible to him/her) the following rules apply when WorkPool determines the default account to use when sending an email:

a. **When sending a new email**

If only one sending account exists, use that account, otherwise select an account in the following order:
- Choose Personal sending account set to Default, else
- Choose Personal sending account where the From address of the personal SMTP account matches the From email address set for this Resource, else
- If no Personal sending account exists then default to the sending group with a From email address that matches the From email address set for this Resource.

b. When replying to or forwarding an email message

If only one sending account exists, use that account, otherwise select an account in the following order:

- If the email was sent from WorkPool:
  - Look at the From address and if the From address matches any email address in the user's sending profiles then use that account as default. e.g. if I have permission to send as a Support user, then assume I want to continue sending as a Support user. If no match on the From address then proceed with rules in the list as per downloaded message below.
- If the email was downloaded into WorkPool:
  - Consider all the To addresses and compare based on matching criteria and order specified above for best fit. If no match found, look at the CC addresses then compare based on same rules and determine best match. If still no match found and email is of local origin look at the BCC addresses then compare based on rules above. If still no match above, take the first "best case" match as defined in the previous section.

5. Re-file Emails

As part of ongoing development and user requests the feature to change the directory entry of an email that has already been removed from the inbox has been added to WorkPool.

This feature can be found by opening up an email from your task (or any location provided it has already been removed from your inbox) and then expanding the email options panel. It is important to note that only users that are involved with the email (Sender or Recipient, CC, BCC) can make changes to the email. If you are not one of the recipients or sender of the email then this icon will not appear.

An entry icon is present towards the end of the list

When this feature is used, WorkPool will first check if the email is still present in another user's mail box. In the case of it being in someone's inbox you will receive a warning popup telling you who these users are. This is done so you are aware that someone else can still link this email to other entries.

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If the mail is not in anyone's inbox (or you click okay on the warning popup) a window showing you which directory entries the email is currently linked too, along with a text field allowing you to enter the name of another directory entry. You can remove the email from any linked directory entry by clicking on the purple X next to its name.
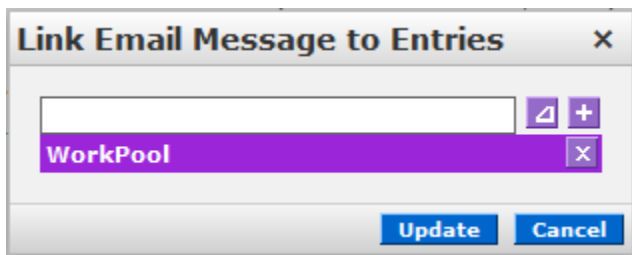
You will need to click on Update to save your changes

6. Email Confidentiality Functionality

Users now have the ability to update the confidentiality of both sent and received emails. This is done by clicking on the "Change Email Sensitivity" icon

This will allow users to set the sensitivity of the email to Normal, Personal, Private or Confidential.

7. Changes to Existing Features to introduce sending profiles

a. Update Email Bulk Sending via Directory Report to support profiles (157120)
b. Update Out of Office / Auto Responders to make use of Sending Accounts (157121)
c. Update Email-to-Text Message service to make use of Sending Accounts (157123)
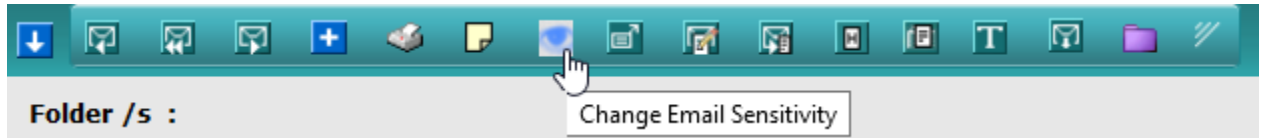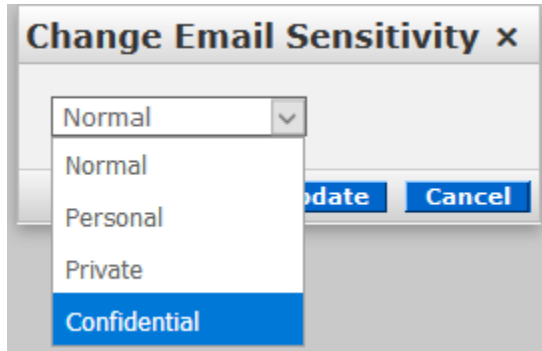d. Update email message sender service to cater for multiple sending accounts (157124)

8. Minor Changes and Bug Fixes

a. (**160136**) Minor Change: Addition of a checkbox range selector in the Inbox and General mailbox. A user can select a checkbox and then use Shift-left-click to select all the emails above or below the same mailbox. This is useful for bulk selections in a list of emails.
b. (**157638**) Fixed Bug: When scrolling down on an email message with the IPad and reaching the end of the email message scrolling stops working and the IPad attempts to scroll the entire screen including the menu bar.
c. (**157283**) Fixed Bug: Bulk operation action panels for emails not visible (displayed off screen) when working on devices or small screens. When working on mobile devices, small screens or on screens where the content is stretched, e.g. due to long subjects, the utility panels are not always visible when displayed in the centre of the screen. As a result the user needs to scroll around to find and then update the panel.
d. (**157914**) Minor Change: In WorkPool 4 we had an option called "Move to Folder" when clicking on the drop-down menu in the email inbox listing screen. This was replaced with the "Link to Entry" option. In WorkPool 4 you could remove the linked email messages

from the Inbox at the same time as linking it. To facilitate both old and new functionality we have added an additional checkbox to the dialog where the linking occurs called "Remove emails from Inbox after linking".

e. (**153348**) Minor Change: Sometimes an email received in WorkPool needs to be exported as a file and attached as proof in another system, e.g. for a transaction. A new icon was added to the email action panel to allow a user to download an email in it's raw .EML format. This will create a single file with all the attachments and content as received as close as possible to the original email. Header information is excluded from the export although it is still visible and accessible in WorkPool. This is because the format header information is stored in in WorkPool cannot be used to reconstitute these headers at present.

9. Additional Changes and Bug Fixes as part of updates

1. **Change/New:** [TASK:167417] TinyMCE Formatting of paragraphs and line breaks
2. **Change/New:** [TASK:167256] - Text Message / SMS Sent Report (System Admin)
3. **Change/New:** [TASK: 162998] - New function added to the email action panel to change Sensitivity on sent/downloaded/received emails. Audit note added to records this action.
4. **Change/New:** [TASK: 162998] - New function added to the email action panel to allow a user to Re-File an email linked to an Entry folder/s that has already been removed from the inbox. Audit note added to records this action.
5. [TASK:164915] - Setting Task next action from Email Composer not working
6. [TASK:161994] - Auto-Save function causes email content to be lost if email opened in multiple windows
7. [TASK:164107] - Email sender thread does not implement connection timeout
8. [TASK:164125] - Default SMTP connectivity approach causing tar-pitting / grey listing
9. [TASK:162577] - Clicking on any Email Template group to either edit or add it in throws an error
10. [TASK:162182] - Cannot send bulk emails when a System SMTP Accounts has been configured
11. [TASK:162395] - Adding email account for first time, saves as disabled, not enabled.
12. [TASK:160159] - Insert Task Number feature on emails not updating with changes to linked tasks
13. [TASK:163212] - Cannot de-link a task from an email draft
14. [TASK:157283] - Bulk operation action panels for emails not visible (displayed off screen) when working on devices or small screens
15. [TASK:164714] - Email can be sent can then deleted by opening it as a draft first

16. [TASK:164706] - Spell checking in Afrikaans does not set Afrikaans dictionary as selected
17. [TASK:164709] - Email composer not applying formats to email message content correctly
18. [TASK:165376] - First downloading account configured for "IMAP (SSL)" not working as expected
19. [TASK:164553] - Email Search screen does not indicate outcome if "no results" were found
20. [TASK:163407] - Order of Priority list items on Email Composer do not match Default
21. [TASK:157782] - The feature to enable automatically adding time is not working
22. [TASK:164762] - Embedded Email Attachments not displayed on screen when validation error occurs while composing email
23. [TASK:166060] - Incorrect sending account selected upon forwarding or replying to messages
24. [TASK:167708] - Incorrect From address copied from internal emails if sender does not have own sending account
25. [TASK:164115] - Recently Signed off Tasks icon not visible when viewing email already linked
26. [TASK:157991] - Scrolling error and buttons for Email Template manager not accessible on Mobile Browsers
27. [TASK:168066] - Emails with multiple attachments/embedded images with same name can be overwritten
28. [TASK:166341] - Cannot view All Sent Items
29. [TASK:165770] - TO addresses copied into the CC address field on Sending Account selection screen
30. [TASK:166219] - Error when deleting an email template
31. [TASK:165335] - Function to Auto Save email does not display warning when connection to server is lost
32. [TASK:166747] - Auto Save email draft not working when forwarding Email as Attachment
33. [TASK:165339] - Option to toggle default sending account not available when activating account
34. [TASK:165596] - Delete button available when adding new mailbox
35. [TASK:165337] - Default period for Email Folders in Personal Account Settings can override maximum system property
36. [TASK:166638] – Confirm email recipients page replaced by single # when sending email messages in Edge.
37. [TASK:167333] – When forwarding an email with embedded email messages the embedded messages are lost.
38. [TASK:167791 – Email signature tool shows inactive users and users without Email Addresses.
39. [TASK:168960] – Cannot move/remove an email linked to a personal folder to another folder.

40. [TASK:170814] – Table Formatting options appear on Time Assist Panel
41. [TASK:171300] – Email Signature lost when using "Replace content with template option
42. [TASK:163000] – Re-File Email functionality
43. [TASK:162998] – Email sensitivity on Sent/Received emails

DASHBOARD / INTRANET

1. **No major changes or improvements**

2. **Additional Changes and Bug Fixes as part of updates**
   1. [TASK:157456] - Cannot remove announcements from dashboard
   2. [TASK:165914] – Users can manipulate announcement URL to gain access to announcements they are not allowed to see

DIRECTORY

1. **No major changes or improvements**

2. **Additional Changes and Bug Fixes as part of updates**

   1. **Change/New:** [TASK:155498] - Allow Resource Groups as Manager on JDBC Sources but not File Sources
   2. [TASK:164038] - Adding attribute instances to views consumes all database connections
   3. [TASK:164292] - Deleting a mapped attribute from a View Definition breaks existing entry mappings and imports
   4. [TASK:164303] - Changing View Definitions or related permissions causes server timeout when dealing with high volumes
   5. [TASK:162743] - Entry folder lookup control's Search Entry by Views not sorted alphabetically
   6. [TASK:163191] - Bulk email sender with one invalid address rejects all
   7. [TASK:162749] - Double lines displayed on entry when 1 View with inactive View Definition linked to it
   8. [TASK:163541] - Entry Edit screen accessible for inaccessible entries
   9. [TASK:165836] - Running a directory report and selecting "Display as Views" is unsortable if custom formatting applies
   10. [TASK:164753] - Sending bulk email from Directory Report loses email body content if validation fails
   11. [TASK:164403] - Update filter and linking options for bulk email and text message communication
   12. [TASK:168414] - Directory export can consume all managed connections for MySQL over time
   13. [TASK:167697] - Distant future date values cause server error and broken Views/Processes.
   14. [TASK:170219] - User's Date Format preference overwrites export syntax specified on Directory Reports

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15. [TASK:171110] - Changing attribute name on a View Definition does not update links to Processes
16. [TASK:171992] – Deleting a Views adds restricted information to Entry Audit notes making it accessible to all users.

FILES

1. **No major changes or improvements**

2. **Additional Changes and Bug Fixes as part of updates**

    1. **Change/New:** [TASK:154395] - Add support for searching on document code to More Documents FILES tab
    2. [TASK:164631] - Moving a document to another folder which contains a document with the same is not allowed
    3. [TASK:168245] - Duplicate name error on Root Folder when another folder exist elsewhere with same name

ITEMS

1. **No major changes or improvements**

2. **Additional Changes and Bug Fixes as part of updates**

    1. **Change/New:** [TASK:155495] - Allow for Past Expiration dates on Items

PROCESS MANAGEMENT

1. **No major changes or improvements**

2. **Minor Changes and Bug Fixes**

    a. (**155998**) Fixed Bug: Starting transitions referencing attributes with default values causes an error. The process did not read default values from attributes and instead a message was displayed "Required view on entry does not exist or entry doesn't not have the required attributes".
    b. (**160039**) Fixed Bug: Rule to enforce future values for DateTime Attributes did not work and did not applying the "now" default. Date Time attributes with the "Default Date to Now" option selected remained blank (no value). In addition, if the Date Format Rule was set to "Today (now) and Future Dates Only" neither future nor past dates were allowed.

> ### 3. Additional Changes and Bug Fixes as part of updates
>
> 1. Change/New: [TASK:161966] - Putting a process on hold
> 2. Change/New: [TASK:167204] - Update Attribute values on a process
> 3. Change/New: [TASK:161964] - Copy values from parent process when starting new child process
> 4. [TASK:164538] - Read only Date values displayed as Unknown when compulsory information is missing when updating process attributes
> 5. [TASK:162357] - Unable to stop a child process started as external from a parent process
> 6. [TASK:164366] - Process Designer "Duplicate Flow" feature does not duplicate attribute actions
> 7. [TASK:167549] - Edit Attribute screen stops validating at first error
> 8. [TASK:157237] - Linking required process attributes to views result in blank values if process not updated
> 9. [TASK:167551] - Attribute instance values entered by user is lost when input is invalid (Blue bubble)

TASKS AND ACTIVITIES

1. **No major changes or improvements**

2. **Minor Changes and Bug Fixes**

   1. (**160215**) Fixed Bug: Completed-on date not set for Activities created using "Time Taken to Log Task" on the Start Task screen. When a task is created the user can add in the time taken for creating the task as an activity. These activities were being saved without a completed-on date and therefore were not being included in the reports or time assist module. The migration will update these old activities to have the same date and time as the created-on date and time.

3. **Additional Changes and Bug Fixes as part of updates**

   1. [TASK:163321] - Task Escalation error occurs when notifying resource by email
   2. [TASK:164614] - Task Audit Note shows null as Assign To value when Recurring task is assigned to a Group
   3. [TASK:164587] - Error occurs when deleting a task with an activity with attachments
   4. [TASK:164660] - Cannot update task status when reassigning tasks in transfer to owner
   5. [TASK:158855] - "Jump to Bottom" icon on tasks shifts entire screen in Classification List View
   6. [TASK:167726] - Cannot cancel time logging prompt when closing open activity
   7. [TASK:156896] - Task owners could accidentally close off a declined task when editing it and status not updated

8. [TASK:168230] - Error on Bulk Archiving of Tasks
9. [TASK:168276] - Task Drop Menu does not disappear when clicking elsewhere on Recurring Tasks and Other Resources
10. [TASK:167653] – Error when reassigning tasks from "Reassign Active Tasks for Resource"
11. [TASK:168294] – Custom task list does not refresh when adding tasks
12. [TASK:169594] – Error occurs when escalating a task assigned to a resource group
13. [TASK:169849] – "Task Changed" Notifications sent for same task linked to multiple Custom Lists
14. [TASK:170081] – Activity Title wrapping and "Jump to top" link on process tasks not working in Chrome
15. [TASK:170336] – Internal Server Error when reassigning recurring task ownership in bulk
16. [TASK:171403] – Task Predecessor/Parent value defaults to cached value when running Directory Report from a Task
17. [TASK:171894] – Cannot edit Task Classification if "belongs to" value specified

WORKPOOL SYSTEM ADMINISTRATION

1. **No major changes or improvements**

2. **Additional Changes and Bug Fixes as part of updates**

   1. [TASK:164658] - Service to upload files from external sources not working
   2. [TASK:164090] - System Event Log only shows oldest 50 results
   3. [TASK:168280] - "Select resource button" does not work when adding a new business unit
   4. [TASK:168523] – Popup windows used for selections causing windows to be closed on Chrome iPad.
   5. [TASK:169592] – Position of "Add Entry" feature on "Link Email To Directory Entries" is incorrect.

WORKPOOL MOBILE - ANDROID

1. **Additional Changes and Bug Fixes as part of updates**

   1. [TASK:158356] - Deleting Calendar Event via Mobile App does not delete event on WorkPool
   2. [TASK:160404] - User is not saved in Mobile Broker database if another user exists with the same email address.
   3. [TASK:162376] - Cannot upload files larger than 1mb
   4. [TASK:163534] - Mobile App provides access to Views not accessible to resource

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5. [TASK:163919] - User can attempt Mobile App install without having a primary email address specified (required)

WORKPOOL PLUG-INS (ADD-ONS)

1. **No additions**

2. **Additional Changes and Bug Fixes as part of updates**

   1. [TASK:163650] – Time Assist: Error occurred when configuring Email Module Configuration (System SMTP Account)
   2. [TASK:165386] – Time Assist cannot run more than one schedule per day
   3. [TASK:167774] – "Send emails from" option not working properly
   4. [TASK:168507] – MODULE: Time Assist V2.0 (Automated TimeSheet and Task Deliverable Reporting

ANNEXURE: KNOWN ISSUES IN 5.02.X

- **None**

ANNEXURE: Changes to line breaks in WorkPool Email Composer (From v5.02.09)
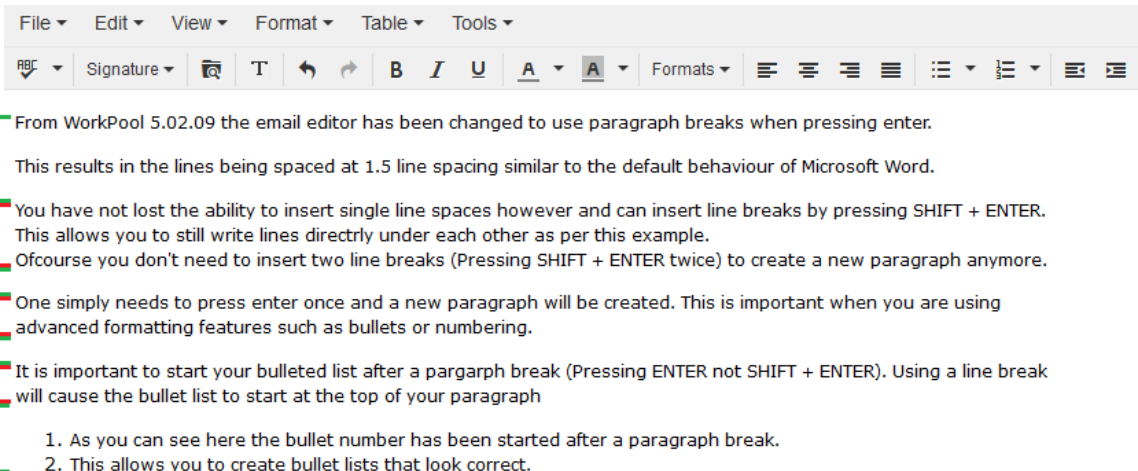
For the most part, HTML emails have replaced plain text emails as the norm. The multitude of email clients and web-based email services, combined with different browsers such as Chrome, Firefox and Internet Explorer make it increasingly difficult to display content in exactly the same way for all users. Even perfectly controlled environments like websites will display content differently in one browser to another depending on how the content was written and where it is displayed.

The HTML standard distinguishes between **paragraphs** and **line breaks** when displaying content, much like what Microsoft Word does by default, however each editor has its own way of dealing with content and defaults that apply. Apart from line spacing, the use of paragraphs and line breaks is also significant when displaying formatted content such as bullets, numbering and indentations. Without enforcing more structure and compliance to the HTML standard one runs the risk of emails being badly formatted with mixed fonts, different sizes, bullets and numbering not working as expected and as a result the content received by other parties not looking the way it was intended.

Line spacing changed from single line to double line (paragraph) spacing for HTML messages

When you press enter in the email editor WorkPool will now by default add a paragraph break (1.5 line spacing). You have not lost the ability to add single line spaces and can still add single line breaks by pressing SHIFT-ENTER as with most editors.

What has changed and what do you need to do?

If you are making use of an HTML Signature, then you will need to edit your signature within WorkPool, and save it in order for it to be updated. In some cases, you may see a paragraph break inserted above your signature, however when you reply or compose an email, this space will not be present.

You will also need to edit and Save any HTML Email Templates so that they are also updated.

Can I change this back to the way it was before?
This change is a setting that is configured on the 3rd party email editor WorkPool incorporated and the change was made to ensure your content looks consistently across the board in as many email clients as possible. It is not a feature that can be disabled.