

**ProcessIt 8.3 Release Notes
Enhancements and Fixes
April 20, 2010**

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1. Proxy Approvers

This new feature allows workflow participants to designate temporary approvers on their behalf while they are unavailable (i.e. on vacation). Users create a Proxy Approver Definition document for themselves (or administrators can create them on behalf of anyone) to designate their proxy(s), the effective dates of the designation, and the workflow(s) to which it corresponds.

Beginning on the effective date, any documents entering a step where an approver in the Proxy Approver Definition document is an approver in workflow document, the Proxy Approver will be able to become an approver on behalf of the original approver.

Emails will not be sent to the proxy approvers, but documents pending proxy approval will appear in proxy approvers' 'Work Awaiting Me' views.

Proxy Approver Definition

This form allows you to specify one or more people allowed to approve on behalf of a named approver in one or more workflows. The Proxy may be granted for a defined timeframe or on an on-going basis. Proxy approvers are granted the same rights as the person for whom they are acting.

Approver name	Al Dente/Teamwork ▾
Proxy approver(s)	Phil Harmonic/Teamwork ▾
Effective dates	<input type="checkbox"/> This proxy should remain active indefinitely <i>Choosing the option above allows this Proxy to remain active until such time as it is disabled. As such, it will not be subject to a limited timeframe during which it is active.</i> <i>Use the fields below to specify the start and end dates and times for this Proxy.</i> Starts: Mon 05/03/2010 16 05:00 PM Local time Ends: Fri 05/07/2010 16 08:00 AM Local time
Applicable workflows	<input checked="" type="checkbox"/> Expense Reporting <input type="checkbox"/> Travel Requests <input checked="" type="checkbox"/> New Equipment Requisition
Allow editing by	▾

When the Proxy Approver document is saved, ProcessIt evaluates all active requests to determine if any fall within the criteria for the proxy (current approver, date range, and workflow), as well as if they are confidential requests. For all confidential requests, ProcessIt adds the proxy approver to a Readers field named TSWFProxyNames so that the proxy approver can read the document. In non-confidential documents, TSWFProxyNames is a Names field (not a Readers field).

When a proxy approver opens a document they are a proxy for, ProcessIt determines if the Proxy Approver document is effective and, if so, displays the 'Be Proxy' button. If the date range has passed (or has not yet begun), the 'Be Proxy' action will not display.



Once the proxy clicks on the button, ProcessIt updates the document to allow the proxy the same rights as the original approver.

2. Configurable Workflow Title

In prior versions, the workflow forms (MainTSR and ResponseTSR) each included an editable field in which users were expected input a free form text title. Due to the very high number of deployments which computed the title using formula language, it will be configurable starting in version 8.3.

The configuration form now contains an option to program the title field by writing a formula.

Administrative Options

You can identify global settings for your workflow in this section of the Workflow Configuration form.

General | Action buttons | Metrics | Numbering | Pre-send validation | Security

Admin setup | LotusScript / @Formula | Doclinks / URLs | Other options

- Automatically compute the document title for each request 
 [[PlantNumber]] + " / Engineering Request" 
 [Check the code](#)

- Hide the Standard PI Header section 

- Suppress details of automated steps in workflow history 

- Allow the originator to recall (or cancel) a request at any time 

- Allow requests to be put "on hold" 

- Allow the originator to reopen a request after it has been approved

- Automatically refresh workflow state from configuration 

- Cascade status categories for sub-workflows
- Maintain separate category entries for sub-workflows

- Compute Escalation/Re-escalation times only when entering a step or escalating the doc

Note, this formula, when used, is recomputed each time the document is saved and processed through the ProcessIt save routines. You may want to devise the formula so that it only computes once or when you wish it to compute. For example:

```
@if(TSWFTitle!=""; TSWFTitle; "New Request created at " + @Text(@Now))
```

3. Hide-able Header

By default, ProcessIt exposes a default header between two horizontal rules. This header contains the workflow name, document number, who the requester was, when it was submitted, document title, and status. Due to the frequency with which customers modify the MainTSR, hide this section, and create their own headers in their subforms, hiding the header will be configurable starting in this version.

Test (#10-00001)
Requested by Steve McIntosh, 03/01/2010 11:11 AM

Request title:
Current status: *In Process*

The configuration form now contains an option to hide the entire header shown in the graphic above. This option requires that the title be computed (see feature # 3) and that the confidentiality option not be set to optional (feature # 2c).

Administrative Options

You can identify global settings for your workflow in this section of the Workflow Configuration form.

General | Action buttons | Metrics | Numbering | Pre-send validation | Security

Admin setup | LotusScript / @Formula | Doclinks / URLs | Other options

Automatically compute the document title for each request

[[PlantNumber]] + " / Engineering Request" [Check the code](#)

Hide the Standard PI Header section

Suppress details of automated steps in workflow history

Allow the originator to recall (or cancel) a request at any time

Allow requests to be put "on hold"

Allow the originator to reopen a request after it has been approved

4. New Confidentiality Options

In prior versions, the configurable confidentiality function allowed users to determine whether or not to make a particular document confidential—that is, to limit access to the document to workflow participants and administrators. Forcing confidentiality on all requests (that is, to not make confidentiality an option) required a modification to the design of the MainTSR form.

Beginning with 8.3, the configuration form now contains an option to select the level of confidentiality from the following three options:

- Do not allow confidential requests (default)
- Allow users to make some requests confidential (off by default)
- Force all requests to be confidential (off by default)

Administrative Options

You can identify global settings for your workflow in this section of the Workflow Configuration form.

General | Action buttons | Metrics | Numbering | Pre-send validation | Security

Security options

Do not allow confidential requests

Allow users to make some requests confidential

Force all requests to be confidential

Require user authentication (i.e. password) before taking action

Limit the users who can create new workflow documents of this type

5. More Confidentiality Changes

In prior versions, confidential documents in draft status were not actually made confidential until the document was sent for processing. Because of this, any user could see documents that had been saved as draft. This has been corrected and all Draft documents which are supposed to be confidential, will be.

Also in prior versions, if users changed the confidentiality setting after the document had been submitted to the workflow, the security for that document was not being altered until it moved to another step. This occurred both in the Notes client and web.

Starting in this version of ProcessIt, confidentiality settings are being recomputed each time a document is saved. NOTE: This change only applies to documents where users are given the option to turn confidentiality on/off.

Keep this request confidential

6. 'Other' Action Button Reformatting

In prior versions the 'Other' button appears in the action bar. User need to click on that button to expose additional action options including 'Return,' 'Assign Designated Approvers,' and other functions including some administrative tasks. This was originally done to preserve action bar real estate. Given the proliferation of larger format screens and the high frequency of hiding many options from users, exposing the 'Other' actions will be configurable starting in this version.

The configuration form now contains an option for exposing Other and Admin functions as top level buttons.

Administrative Options

You can identify global settings for your workflow in this section of the Workflow Configuration form.

General	Action buttons	Metrics	Numbering	Pre-send validation	Security
---------	----------------	---------	-----------	---------------------	----------

Control the display of secondary actions

Display all secondary actions under an "Other" button

Include only "Admin" actions under an "Other" button

Do not display an "Other" button for any actions

[What is this?](#)

Change action names at one or more steps

These new action names...	...replace these standard action names
<input type="text"/>	<input type="text"/>

[What is this?](#)

7. Adding Custom Action Buttons For the Web

In prior versions, adding additional custom action buttons for use via a web browser (as opposed to re-naming the standard ProcessIt action buttons) was difficult, if not impossible. Now, any action buttons added to web subforms will automatically be displayed to the right of action buttons generated by ProcessIt.

NOTE: Hide-when formulas will need to be written into the buttons' properties to ensure that they display under appropriate circumstances and the code in the buttons will need to be JavaScript.

8. Approve with Comments

Workflow steps with "Approve" as an option now also have the option to 'Approve with comments'. This will prompt users to enter comments to be recorded into the document history. Both "Approve" and "Approve with comments" are now available to be hidden from approvers (see image below) but only one of the two choices may be hidden at a given workflow step.

The screenshot shows the configuration for a 'Regular approval' step. On the left, under 'Step type', there is a dropdown menu set to 'Regular approval' and a descriptive text: 'Each approver has full reject capabilities. Any single rejection completely rejects the request.' On the right, under 'Hide the following options', there is a list of checkboxes for various actions: 'Approve', 'Approve with comments', 'Reject', 'Disapprove', 'Return to originator', 'Recompute Approvers', 'Reassign', and 'Assign designated approvers'. All checkboxes are currently unchecked.

9. Require Comments

Added in combination with the *Approve with comments* feature, this advanced option allows for making comments of any kind mandatory (users being prompted for comments will be required to enter some text in the prompt box). This option is configurable on a step-by-step basis.

The screenshot shows the 'Require comments' configuration panel. It has a header 'Require comments' and a checkbox labeled 'Require comments for disapprove/reject, etc.' which is checked.

10. Claim This Step For Single Group Approver Entries

In some prior versions of ProcessIt, the 'Allow one approver to Claim this step' option only displayed if more than one approver was listed for the step. This created issues when that one approver was actually an Approver Group. Starting with release 8.3, the option will display if a single group is selected as the approver

The screenshot shows the 'Additional options' configuration panel. It has a header 'Additional options' and a checkbox labeled 'Allow one approver to Claim this step' which is unchecked.

11. Additional Escalation Notification

In prior versions, the options for people to receive escalation notifications were to the Requester, Approver, Process Administrator and Designated Approvers, if any were specified. To further expand the notifications, the escalation function now allows additional people to be notified. These people may be identified by name, group, and/or via a mapped field in the workflow document.

The screenshot shows the 'Escalate stalled documents' configuration panel. It includes a header 'Escalate stalled documents' and a main section with the following options:

- Escalate the request after a specified period of inactivity
- [Escalate this step after...](#)
- 3 days 0 hours 0 minutes (min: 15 minutes)
- Escalate based on an @Formula
- [When escalated...](#)
- Send notifications to one or more people
- Current approvers
- Workflow administrator(s)
- Requester
- Other
- [clear](#)
- Buttons: [By name](#), [By group](#), [From a mapped field](#)
- [Message to use when the workflow is escalated](#)
- STANDARD Escalation Message (dropdown) [create new message](#)

12. Escalating Escalation

In version 8.3, escalation has been enhanced to allow the workflow to be moved to a different step after reaching x number of escalation iterations.

The screenshot shows the 'Advanced escalation' configuration panel. It includes the following options:

- [Advanced escalation](#)
- After 2 iterations, re-escalate to Next
- [Escalation postponement](#)
- Do not allow escalation to be postponed

You can prevent escalating escalation by entering a zero "0" for the number of iterations

13. Disallow Postpone Escalation

Also new in version 8.3 is a flag to hide the Postpone Escalation function to prevent users from stopping the escalation cycle (see image above).



14. TSWFEscalationDate Reset Option

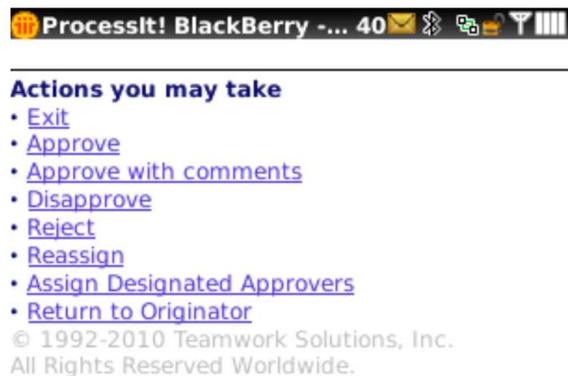
In past ProcessIt implementations where escalation was used in steps with multiple approvers, the TSWFEscalationDate (which determines when to next escalate the document) was reset when any approver took a ProcessIt action on the document.

Starting in version 8.3, a new option under the Administrative Options/Other Options section of the configuration will make this behavior optional. By default, new configurations will be flagged to not reset the escalation date, while existing configurations will be flagged to continue to work as it has in the past.

Compute Escalation/Re-escalation times only when entering a step or escalating the doc

15. Expose Additional Actions on Mobile Devices

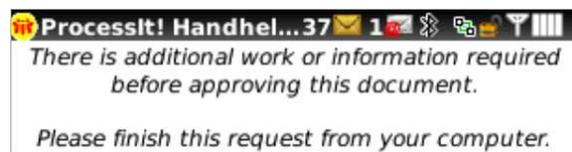
In version 8.1, the mobile device interface only made available basic workflow tasks such as approve, reject, return, etc. Version 8.3 exposes all non-administrative actions to the mobile device interface.



16. Mobile Device Validation

New with ProcessIt 8.3 the step validation will be executed when a user approves a request from a handheld device. If the validation fails the user will be advised of the failure on the following screen with the message:

"There is additional work or information required before approving this document.
"Please finish this request from your computer."



and the request will not be approved.

17. iPhone Full Browser Option

Unlike many other mobile devices, the iPhone uses a (nearly) fully-featured web browser. In prior versions of ProcessIt, the iPhone was not differentiated as a mobile device and, therefore, connections made to ProcessIt applications from iPhones would use the web-specific subform rather than the one designed for mobile devices. Beginning with version 8.3, ProcessIt correctly recognizes the iPhone, renders the mobile device-specific subform, and adds an extra action link giving iPhone users the ability to launch the full web-specific subform if appropriate



18. Configurable, Keyword-Driven Exports

In prior versions, exporting data required the creation of one or more custom views. Starting with ProcessIt 8.3, documents are copied into an Excel spreadsheet formatted with one field per column.

Note: Requires Microsoft Excel loaded on the workstation of the person doing the export. This function cannot export the contents of rich-text fields.



Last updated 03/01/2010 12:38 PM (Steve McIntosh/Teamwork)

This form is required if you want use the built functionality to Export the fields of one or more documents from ProcessIt to Excel (note that Microsoft Excel must also be installed on the workstation requesting the export).

You may create more than one Export Definition form to customize exports for your various user communities. If more than one Export Definition exists at the time the export request is initiated, the user will be prompted to select the export he or she wishes to use. Because of this, careful naming of these documents can significantly reduce the confusion experienced by users. Renaming this document at any time will not affect its functionality.

Export name	Sales Report
Form(s) / subform(s)	Demo.Travel Request

Select the forms and/or subform(s) on which fields you wish to export can be found. Note that ProcessIt normally uses the MainTSR form for workflows (ResponseTSR is used for response workflows) and that you will likely want to include one or both of those forms along with your custom subform(s).

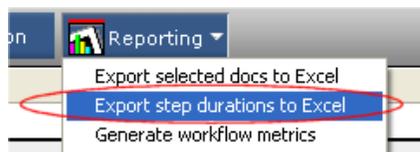
Select all of the fields from the specified forms/subforms which you would like to have included in this Export. This list may be modified at any time.

- | | | |
|---|---|--|
| <input checked="" type="checkbox"/> AdvAmount | <input type="checkbox"/> DialogDate2 | <input type="checkbox"/> HDepart |
| <input checked="" type="checkbox"/> AdvReq | <input type="checkbox"/> DialogEntity | <input checked="" type="checkbox"/> HFax |
| <input type="checkbox"/> Agency | <input type="checkbox"/> DialogFax | <input type="checkbox"/> HName |
| <input type="checkbox"/> Airline | <input checked="" type="checkbox"/> DialogPhone | <input type="checkbox"/> HPhone |
| <input type="checkbox"/> ArrCity | <input checked="" type="checkbox"/> DialogState | <input checked="" type="checkbox"/> HState |
| <input type="checkbox"/> ArrDate | <input checked="" type="checkbox"/> DialogTime1 | <input type="checkbox"/> HZip |
| <input type="checkbox"/> ArrTime | <input type="checkbox"/> DialogTime2 | <input type="checkbox"/> Phone |
| <input type="checkbox"/> ConfNum | <input checked="" type="checkbox"/> DialogZip | <input type="checkbox"/> PickUp |
| <input type="checkbox"/> DepCity | <input type="checkbox"/> DropOff | <input checked="" type="checkbox"/> PickUpCity |
| <input type="checkbox"/> DepDate | <input type="checkbox"/> DropOffCity | <input type="checkbox"/> PickUpDate |



19. Aggregate Metrics Export

New with version 8.3, ProcessIt has the ability to export the aggregate/cumulative time spent in each step to an Excel spreadsheet. The time spent in each step is put into a column which corresponds to that step. If a document moves through a particular workflow step more than once, the time shown for that step is the sum of all the time the document spent in that particular step. Documents in a draft status are ignored.



20. Elimination of Profile Documents for Configurations

In past versions of ProcessIt, workflow configurations used Domino profile documents to hold and quickly retrieve data during the initial opening of the document and subsequent document refreshes. Known caching issues of these profiles caused some changes to configuration settings to not be reflected in a timely or consistent manner.

Moving forward, ProcessIt will not use profile documents for storage of configuration information.

21. Default User in Selection Prompt

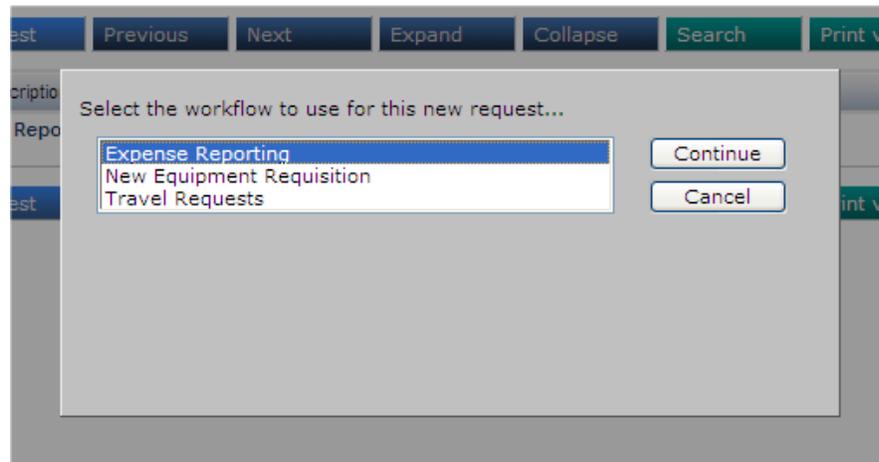
Steps with 'Prompt for user at runtime' in the Approver definition have always defaulted to the first person, requiring users to deselect that person if they were not an appropriate next approver. This often resulted in users inadvertently leaving the default selected.

Starting in release 8.3, the default will be none, forcing users to select a value, but not requiring them to deselect.



22. New Request Dialog Sorted (Web Only)

The "new request" dialog box on the web was sorting choices alphabetically by alias. Starting in this version it is sorted by visible name.



23. Document Locking Performance Improvements

The underlying methodology that handles document locking has been improved upon to increase performance.

Administrative Options

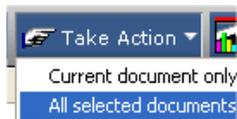
You can identify global settings for your workflow in this section of the Workflow Configuration form.

General	Action buttons	Metrics	Numbering	Pre-send validation	Security
Admin setup	LotusScript / @Formula	Doclinks / URLs	Other options		
How it is used	<input checked="" type="radio"/> ...in ProcessIt! forms using your subform (recommended)				
	<input type="radio"/> ...in a custom-built form				
	<input type="radio"/> ...only as a sub-workflow				
	<input type="radio"/> ...for backup or development only (hide from users)				
Server setup	<input checked="" type="radio"/> ...on only one server but may have remote (laptop) replicas				
	<input type="radio"/> ...on one server with no remote replicas (enables record-locking)				
	<input type="radio"/> ...on two or more servers				
Process administrator(s)	Steve McIntosh/Teamwork				
	<input type="checkbox"/> Send no workflow notifications at any step				
Mail notifications from:					

24. Taking Action On Multiple Documents

In prior versions, non-administrative users with Author access (the recommended default) could not process multiple documents from the view using the Take Action/All Selected Documents action button. The underlying agent would only process the first document and would not update the history correctly.

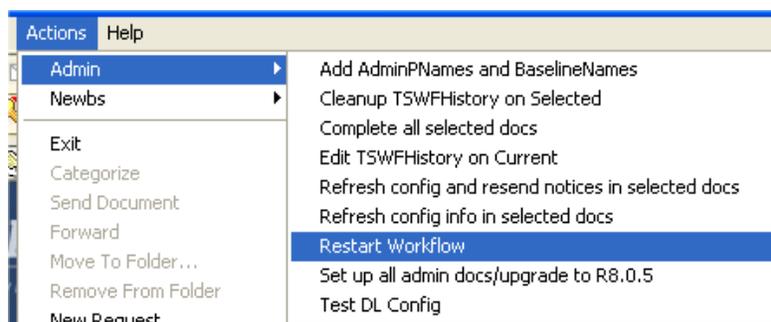
This has been corrected so that normal users can process multiple documents at once.



25. Restarting Workflow on Multiple Documents

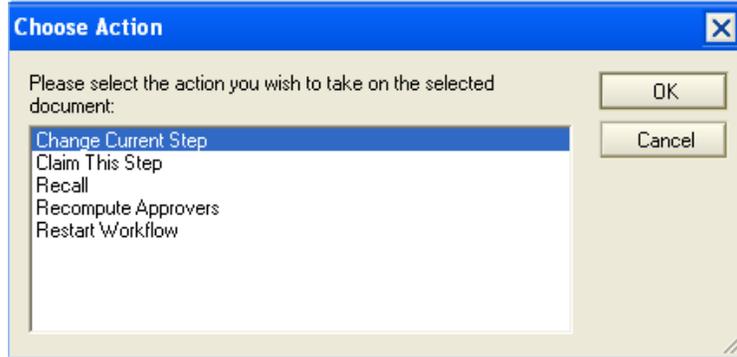
Past versions of ProcessIt could not restart multiple documents when the Actions/Admin/Restart Workflow agent was invoked.

This has been corrected so that users with the WFAdmin role can restart multiple documents at once.



26. Reloading Logic in Documents Moving Back Through Draft Status

In past versions, documents that were either moved back to Draft status, into the first step, or had their workflow restarted did not reload the configuration logic. Starting with this version, any document moving back through the Submit For Processing process will reload its workflow logic from the current configuration data.



27. Author Access Error

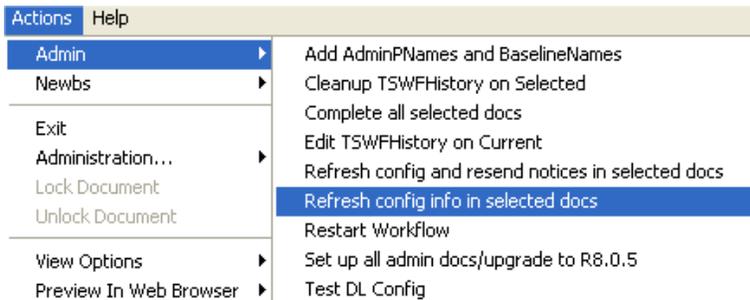
In some limited situations the final approver of a confidential document at an approval step followed by a series of automated steps continued to have Author access until the document was re-saved or moved to another step. This issue has been corrected starting with version 8.3.

28. Accent Handling

In web deployments of ProcessIt, user names with accents (i.e. Olaya González) were causing errors when those names were brought up in prompt boxes. The issue has been resolved starting in version 8.3.

29. Documents Removed From On Hold During Configuration Refresh

In prior versions documents were being removed from being 'On Hold' when the Refresh Config Info In Selected Docs agent was run on them. This has been fixed in version 8.3.



30. Claim This Step From Browser

Documents claimed via browser were showing a "Y" vote in the Workflow summary instead of a "CL" vote. This has been fixed starting with version 8.3.

Already reviewed by... details	Vote	Date reviewed
Steve McIntosh/Teamwork	Y	03/04/2010 02:12 PM

31. Multiple TSWFState0 Fields

Due to Lotus Notes' maximum field storage limitation, large and/or complex workflow configurations in past versions of ProcessIt were sometimes at risk of being truncated. Version 8.3 works around that limitation by parsing very large configuration data arrays into multiple TSWFState fields. No steps beyond the standard upgrade process are required to implement this feature.

32. **Splitting Other Very Large TSWF Fields**

To avoid the same limitations the TSWFState0 field is subject to (Lotus Notes' maximum field storage limitation), version 8.3 will also parse very large data arrays (>27k) into multiple fields. The fields for which this has been changes are:

- TSWFCurApprovers
- TSWFRemApprovers
- TSWFAppvdByWNums
- TSWFTasksAndDueDates
- TSWFStepDescriptions
- TSWFCurApprovalType

While this will avert data overflow in very large workflows, in limited situations it may also impact views and other custom design elements that use these fields, particularly the My Work views and metrics calculations.

This parsing will only occur in very rare situations where workflow documents go through a very high number of step iterations or where the number of individuals on notification distribution lists is very high.

33. **Reformatting Of Dates in TSWFAppvdByWNums and TSWFDistribDate Fields**

Prior to ProcessIt version 8.3, both the TSWFAppvdByWNums field (used to track workflow approvals and approval durations) and the TSWFDistribDate field (used to track notifications sent from "Send Notification Only" -type workflow steps) have used a client-based date format to track the date on which individual actions occurred. These dates were stored along with other information about the action being taken and were, therefore, stored as text strings and not actual date objects.

Because the date format was dependent on the Regional Settings of individual computers, international processing of documents sometimes created inconsistently formatted and/or ambiguous date entries in these fields. In version 8.3, we have reformatted the dates in both these fields and added additional date-type fields to remove ambiguity with regard to international date translation issues.

Explanation of the situation

Prior to version 8.3, when a document is submitted for approval and the user takes action on that document, an entry was added to the TSWFAppvdByWNums field indicating (among other things), the date and time they acted on it. This entry had the format of...

```
"[01]~Al Dente/Teamwork~05/02/2010 03:33:08 PM EDT~Y~1.23"
```

...where the date portion, **05/02/2010**, was generated based on the user's Regional Settings. The problem is that the above date would be considered May 2, 2010 in the US and February 5, 2010 in Europe and many other parts of the world. When all users shared a common Regional Settings format, the values stored as such would be consistent, but in international organizations where some users rely on one format and some on the other, the values stored can cause confusion.

Beginning with ProcessIt version 8.3, the format for both of these fields has been change to a consistent format of YYYY/MM/DD regardless of individual users' Regional Settings. The transaction shown above will now be stored in this format:

```
"[01]~Al Dente/Teamwork~2010/05/02 03:33:08 PM EDT~Y~1.23"
```

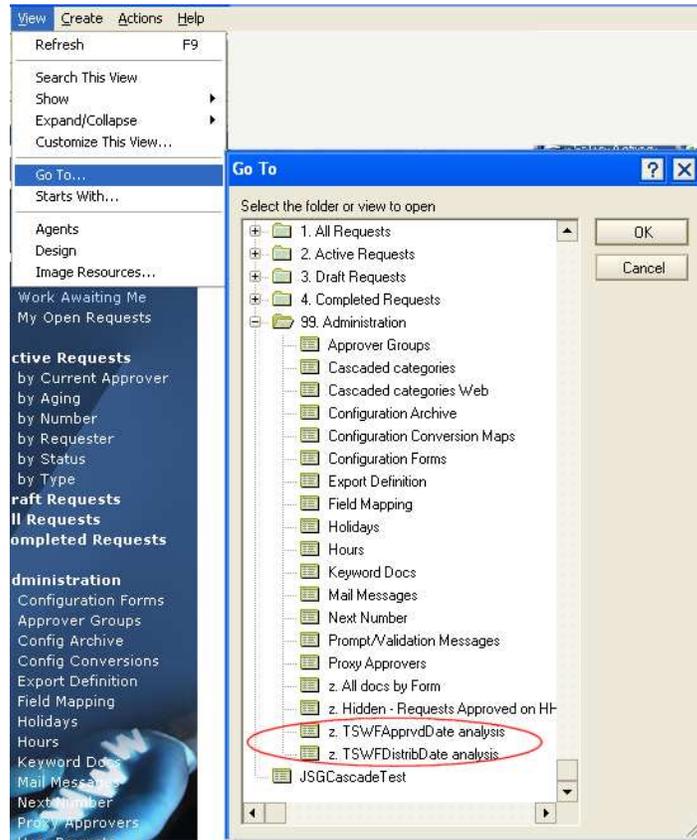
In addition, ProcessIt now includes two new multi-value date fields, TSWFAppvdDTs and TSWFDTs, which will have one date per entry in the TSWFAppvdByWNums and TSWFDistribDate fields, respectively. Because these are date fields, their values are stored as values independent of regional formatting and will always be displayed in the user's native settings.

Although it is not necessary to convert existing documents to the new format (ProcessIt doesn't care), some organizations may want to convert all documents to a consistent format for simplification of reporting.

Converting existing data

To help with the identification and conversion of affected documents, ProcessIt 8.3 includes two new administrative views:

- 99. Administration/z. TSWFApprvdDate analysis
- 99. Administration/z. TSWFDistribDate analysis



The image below (of the '99. Administration/z. TSWFApprvdDate analysis' view) illustrates how the reformatted fields and the conversion tool work.

	TSWFNumber	TSWFApprvdByWNums	Looks like ...	TSWFApprvdDTs	Status	
Docs created in version 8.3	10-00001	2010/03/01 12:54:16 PM EST	01 Mar 2010	01 Mar 2010 12:54 EST	CHECK IT	
	10-00002	2010/03/04 08:38:33 AM EST	04 Mar 2010	04 Mar 2010 08:38 EST	CHECK IT	
	10-00006	2010/03/01 12:54:11 PM EST	01 Mar 2010	01 Mar 2010 12:54 EST	CHECK IT	Ambiguous Dates
	10-00007	2010/03/04 08:38:48 AM EST	04 Mar 2010	04 Mar 2010 08:38 EST	CHECK IT	
Docs created in version 8.1	CBO-09-0328	2010/03/03 02:50:31 PM EST	03 Mar 2010	03 Mar 2010 14:50 EST	CHECK IT	
		2010/03/04 08:38:41 AM EST	04 Mar 2010	04 Mar 2010 08:38 EST	CHECK IT	
	CBO-09-0332	04/27/2009 04:55:59 PM EDT	27 Apr 2009		CHECK IT	Non Yet Converted to 8.3
		04/27/2009 05:17:19 PM EDT	27 Apr 2009			
		05/01/2009 08:46:27 AM EDT	01 May 2009			
	05/01/2009 08:46:35 AM EDT	01 May 2009				
	05/01/2009 08:47:08 AM EDT	01 May 2009				
	2009/04/30 03:10:00 PM EDT	30 Apr 2009	30 Apr 2009	30 Apr 2009 15:10 EDT		Non-Ambiguous Dates
	2009/04/30 03:10:14 PM EDT	30 Apr 2009	30 Apr 2009	30 Apr 2009 15:10 EDT		
	2009/04/30 03:10:27 PM EDT	30 Apr 2009	30 Apr 2009	30 Apr 2009 15:10 EDT		
	2009/04/30 03:10:43 PM EDT	30 Apr 2009	30 Apr 2009	30 Apr 2009 15:10 EDT		
	2009/04/30 03:11:04 PM EDT	30 Apr 2009	30 Apr 2009	30 Apr 2009 15:11 EDT		

You can see that the first four documents (10-00001 through 10-00007) show the new date format (YYYY/MM/YY) in the TSWFApprvdByWNums field (column 2). You can also see that these documents have values in TSWFDTs field (column 4).

Then the first of the documents created in version 8.1 (CBO-09-0328) shows the old date format (MM/DD/YYYY) and does not have a value in the TSWFDTs field. That is because the conversion function (1) has not been run on it.

Finally, the last document (CBO-09-0332), which was created in version 8.1, *did* have the conversion function (1) run on it, so the dates in the TSWFAppvdByWNums field were automatically converted and the TSWFDTs field was created.

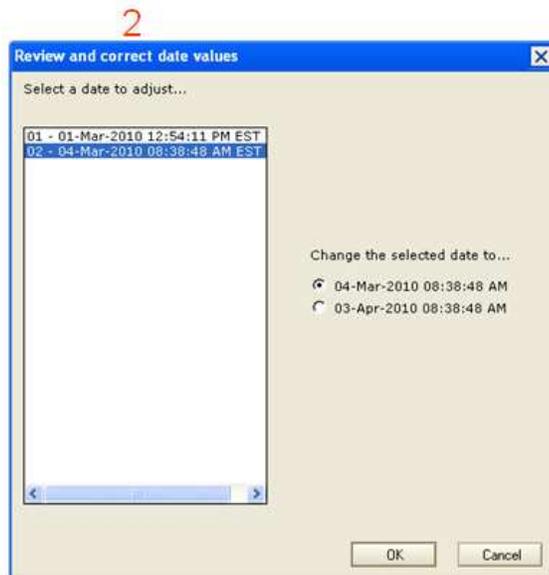
The conversion function (1) will automatically convert all date entries in the TSWFAppvdByWNums and create the TSWFDTs field. In doing so it makes a “best guess” at what the actual dates were/assumes the documents were created using the US regional format (i.e., MM/DD/YYYY).

This view also identifies ambiguous entries – regardless of the version(s) with which they were created by tagging the last column (‘Status’) with “CHECK IT.”

Ambiguous dates are dates which could be interpreted differently depending on which regional format is being used to read them. For example, the first document created in version 8.3 (10-00001) has dates that could be read as March 1st and March 4th or as January 3rd and April 3rd.

By contrast, you can see that the last document (CBO-09-0332) had all actions occur on April 30, 2009. Since that date is unambiguous (a date value of 04/30/2009 can only mean April 30th, 2009, just as a date value of 28/04/2009 can only mean April 28th, 2009), the conversion was obvious and automatic.

To remedy ambiguous documents where automatic conversion may not appropriately convert dates, we have also provided a manual conversion (2) function that allows administrators to convert dates on a case-by-case basis.



An equivalent view with corresponding functions has been added for the TSWFDistribDate, which also has a new date element field (TSWFDISTRIBDATEDT).

NOTE: The conversion function should be run on all existing documents as part of the upgrade process.

ALSO NOTE: Any customizations based on these fields will require adjustments.