ProcessIt 8.3 Release Notes
Enhancements and Fixes
April 20, 2010

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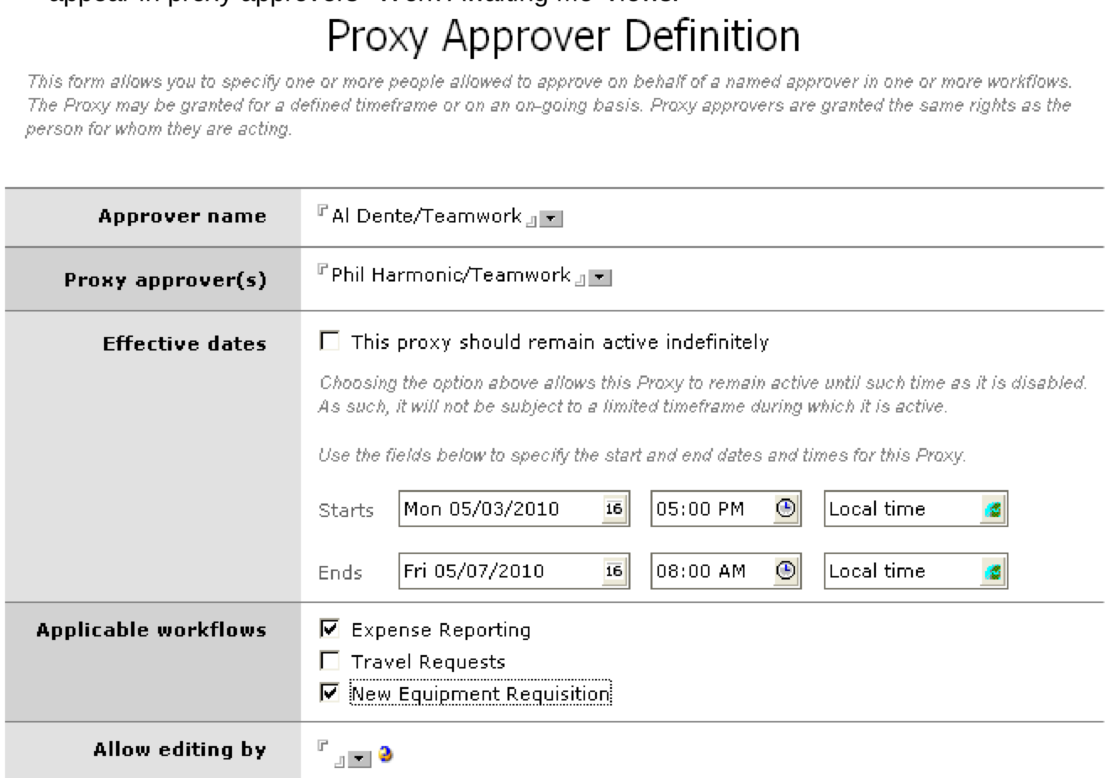
1. **Proxy Approvers**
This new feature allows workflow participants to designate temporary approvers on their behalf while they are unavailable (i.e. on vacation). Users create a Proxy Approver Definition document for themselves (or administrators can create them on behalf of anyone) to designate their 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 <u>will not be sent</u> 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	☐ This proxy should remain active indefinitely *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.* *Use the fields below to specify the start and end dates and times for this Proxy.* Starts Mon 05/03/2010 05:00 PM Local time Ends Fri 05/07/2010 08:00 AM Local time
Applicable workflows	☑ Expense Reporting ☐ Travel Requests ☑ New Equipment Requisition
Allow editing by	

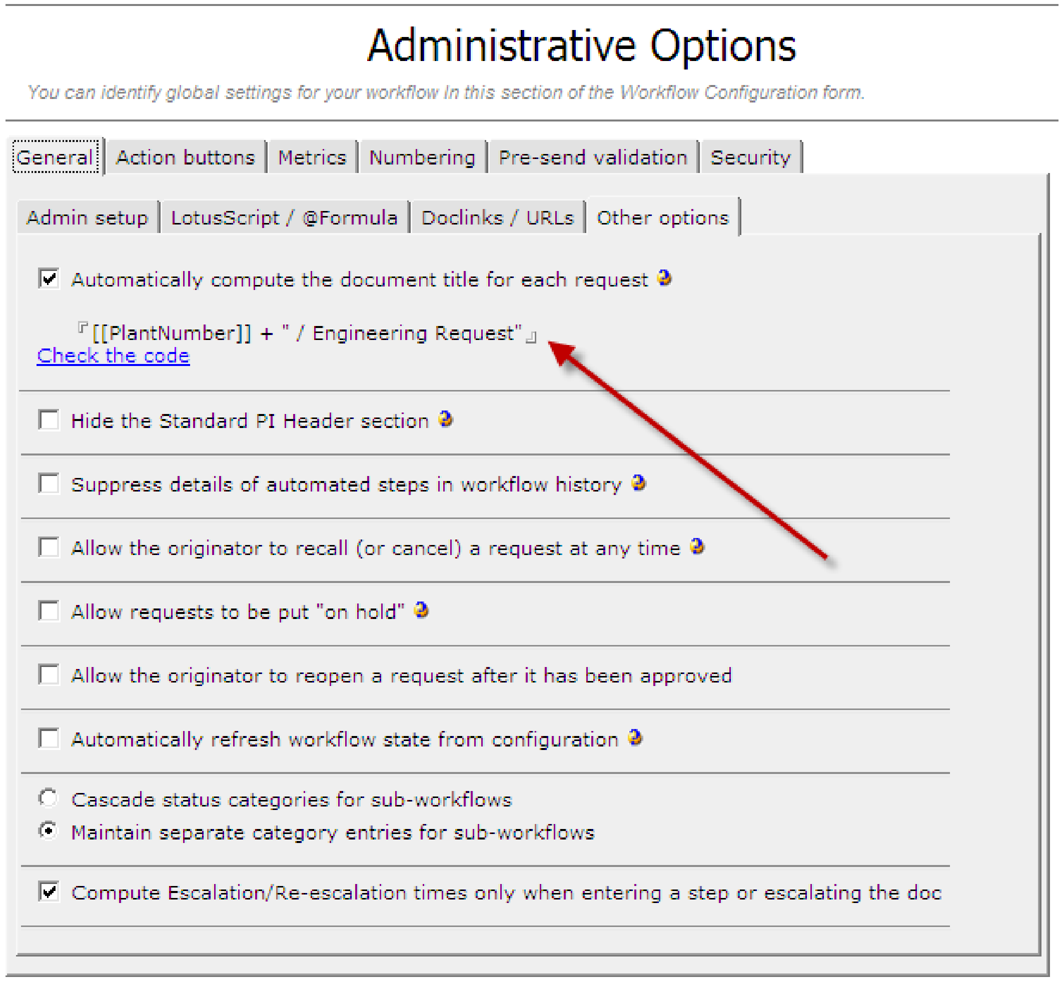
When the Proxy Approver document is saved, ProcessIt evaluates all active requests to determine if any fall within the criteria for the proxy (current approver, date range, and workflow), as well as if they are confidential requests. For all confidential requests, ProcessIt adds the proxy approver to 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.

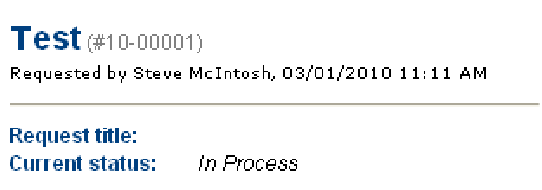
The configuration form now contains an option to program the title field by writing a formula.



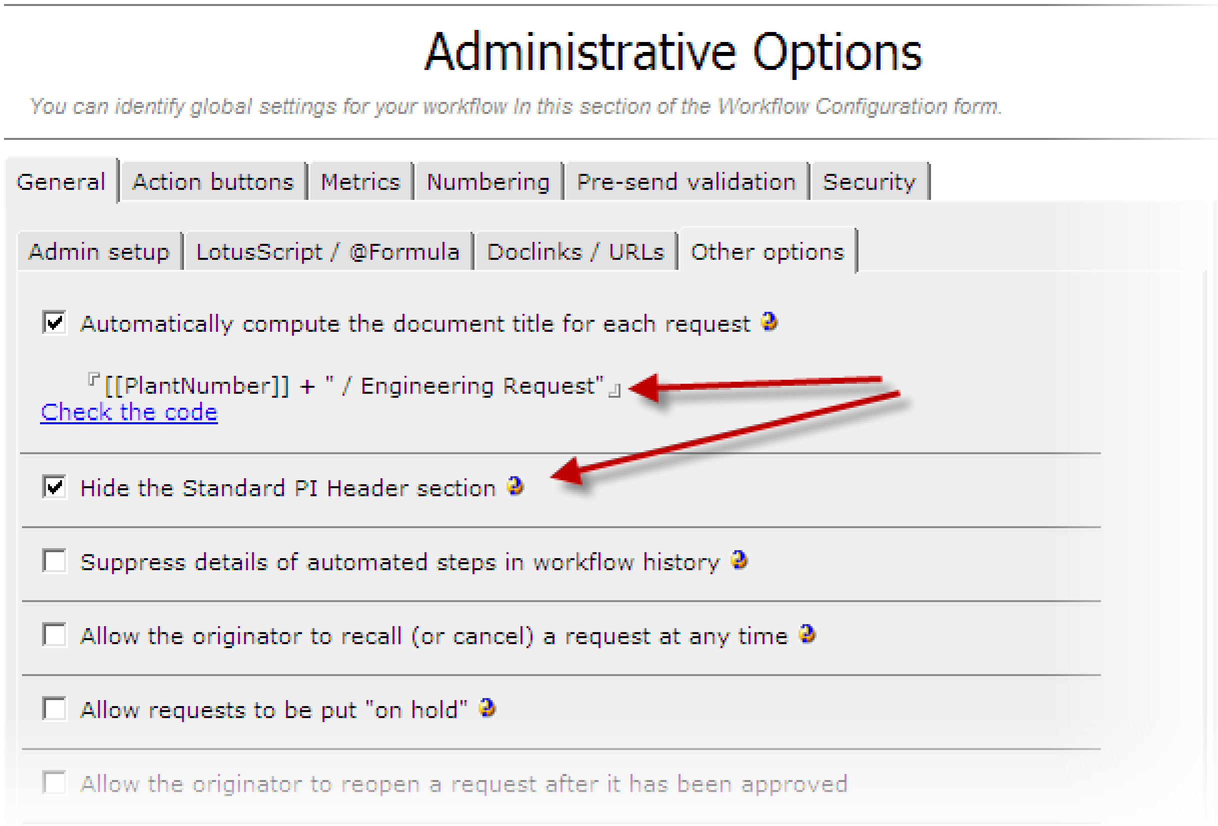
Note, this formula, when used, is recomputed each time the document is saved and processed through the ProcessIt save routines. You may want to devise the formula so that it only computes once or when you wish it to compute. For example:

@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.

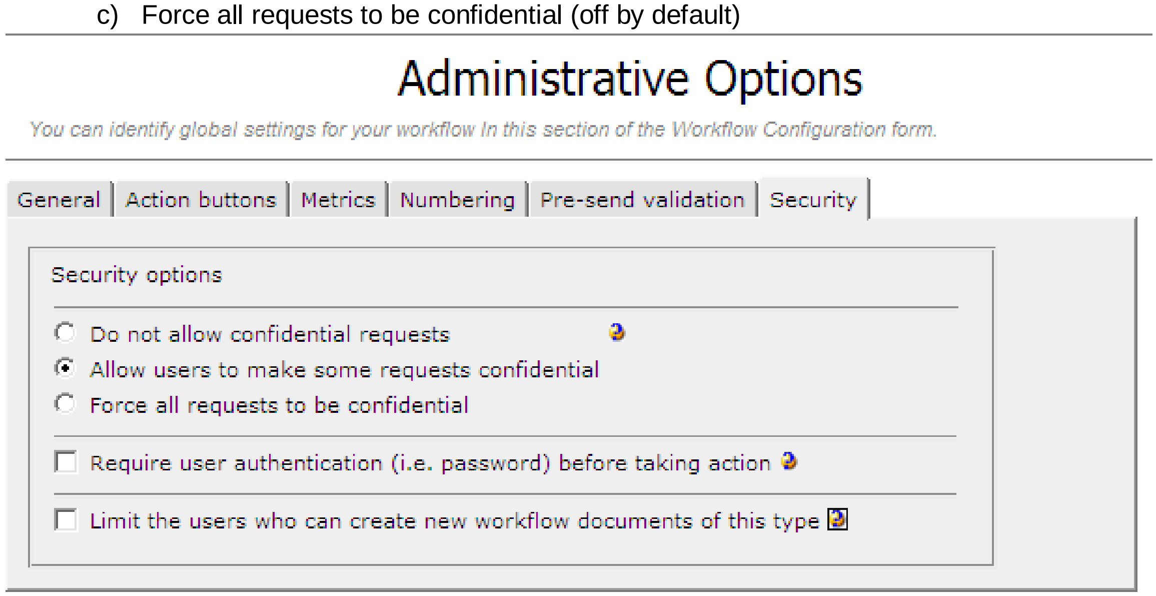


The configuration form now contains an option to hide the entire header shown in the graphic above. This option requires that the title be computed (see feature # 3) and that the confidentiality option not be set to optional (feature # 2c).



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:
a) Do not allow confidential requests (default)
b) Allow users to make some requests confidential (off by default)
c) Force all requests to be confidential (off by default)



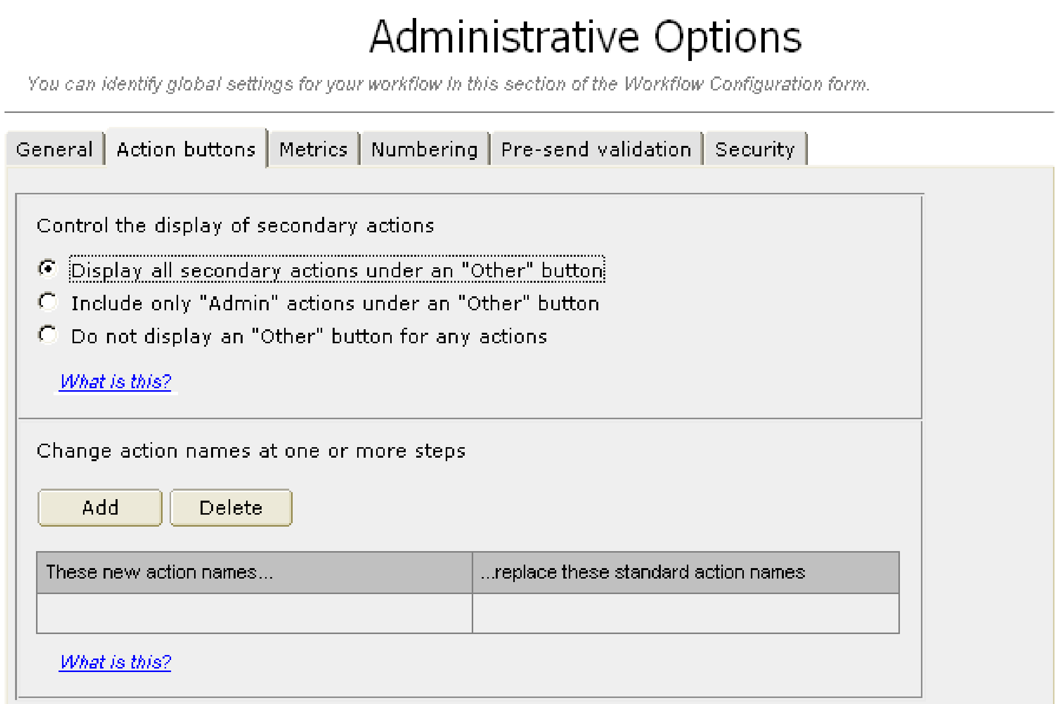
5. **More Confidentiality Changes**
In prior versions, confidential documents in draft status were not actually made confidential until the document was sent for processing. Because of this, any user could see documents that had been saved as draft. This has been corrected and all Draft documents which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

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.



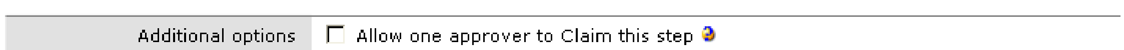
7. **Adding Custom Action Buttons For the Web**
In prior versions, adding additional custom action buttons for use via a web browser (as opposed to re-naming the standard ProcessIt action buttons) was difficult, if not impossible. Now, any action buttons added to web subforms will automatically be displayed 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.

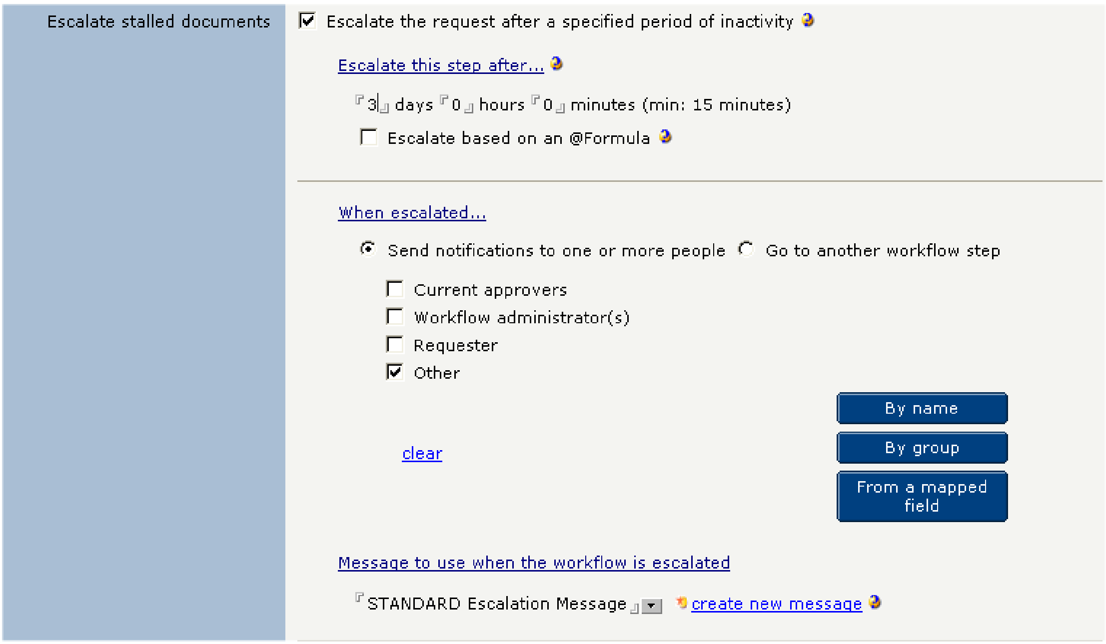
9. **Require Comments**
Added in combination with the *Approve with comments* feature, this advanced option allows for making comments of any kind mandatory (users being prompted for comments will be required to enter some text in the prompt box). This option is configurable on a step-by-step basis.

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



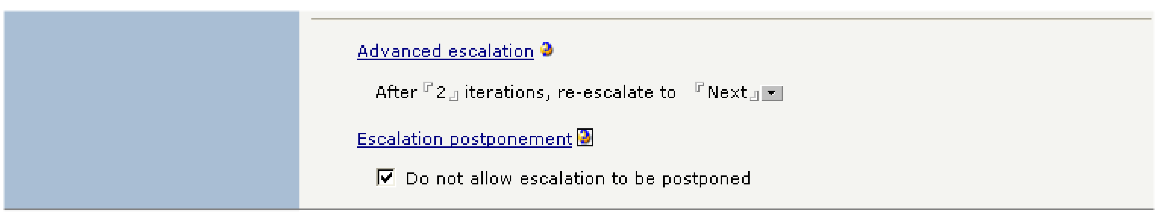
11. **Additional Escalation Notification**

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.



12. Escalating Escalation

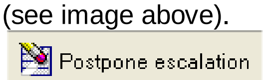
In version 8.3, escalation has been enhanced to allow the workflow to be moved to a different step after reaching *x* number of escalation iterations.



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

13. Disallow Postpone Escalation

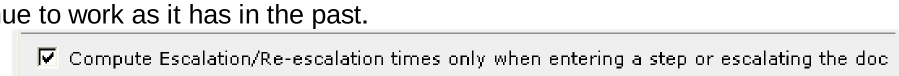
Also new in version 8.3 is a flag to hide the Postpone Escalation function to prevent users from stopping the escalation cycle (see image above).



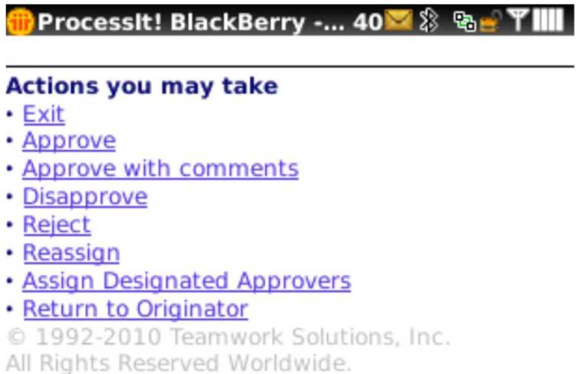
14. **TSWFEscalationDate Reset Option**

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.

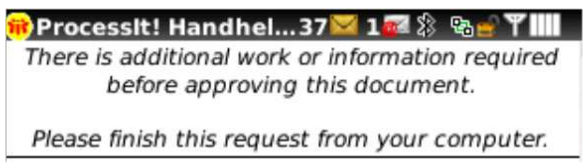


15. **Expose Additional Actions on Mobile Devices**
In version 8.1, the mobile device interface only made available basic workflow tasks such as approve, reject, return, etc. Version 8.3 exposes all non-administrative actions to the mobile device interface.



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.”



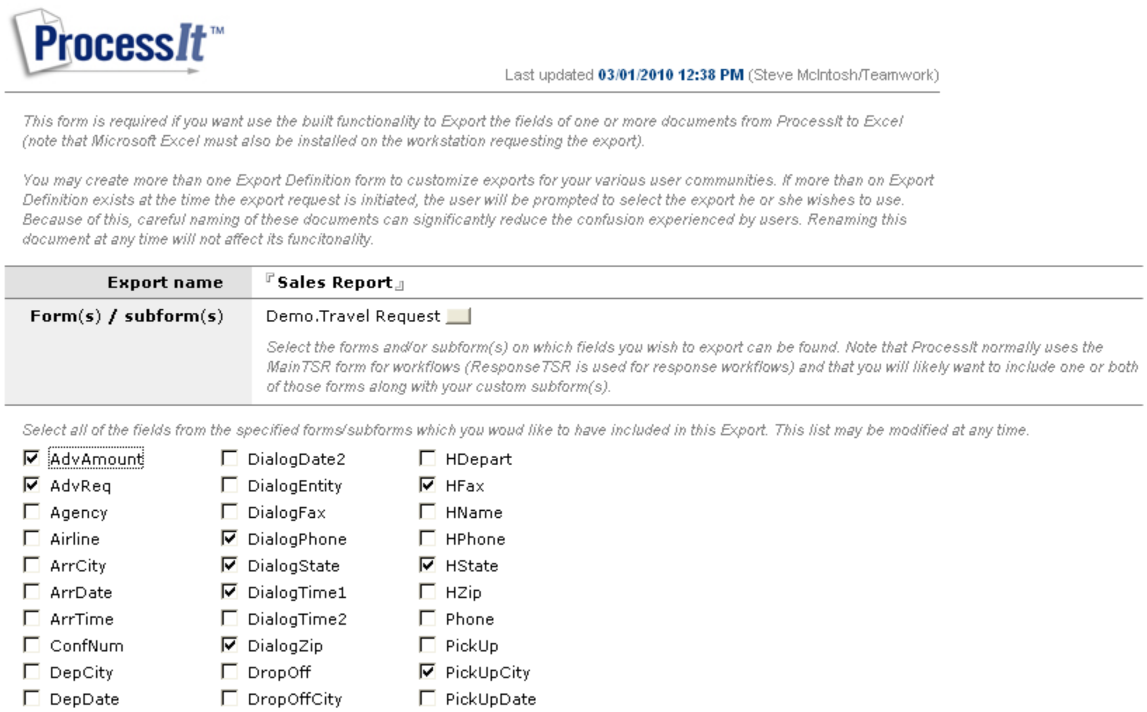
and the request will not be approved.

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

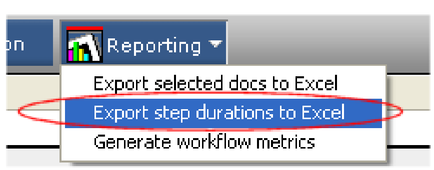
In prior versions, exporting data required the creation of one or more custom views. Starting with ProcessIt 8.3, documents are copied into an Excel spreadsheet formatted with one field per column.

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



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.

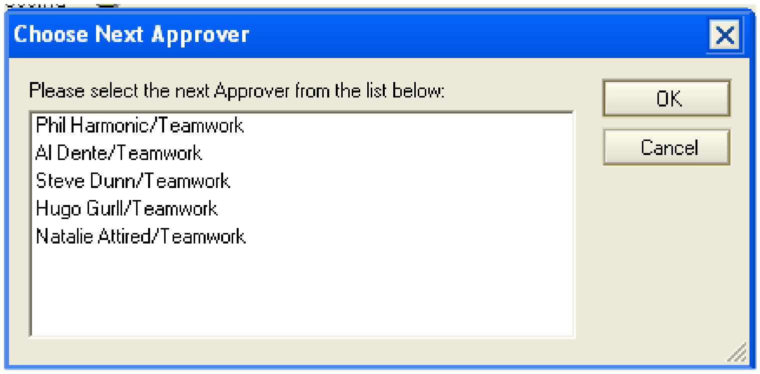


20. **Elimination of Profile Documents for Configurations**
    In past versions of ProcessIt, workflow configurations used Domino profile documents to hold and quickly retrieve data during the initial opening of the document and subsequent document refreshes. Known caching issues of these profiles caused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

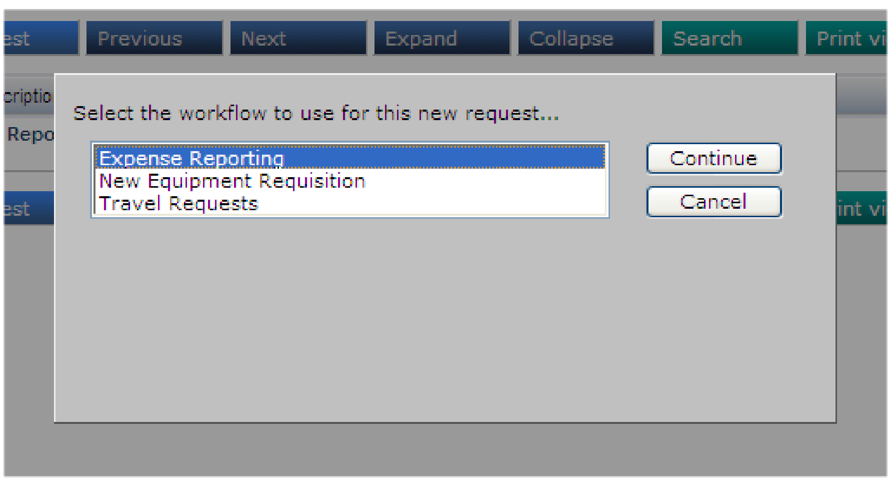
    Moving forward, ProcessIt will not use profile documents for storage of configuration information.

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.

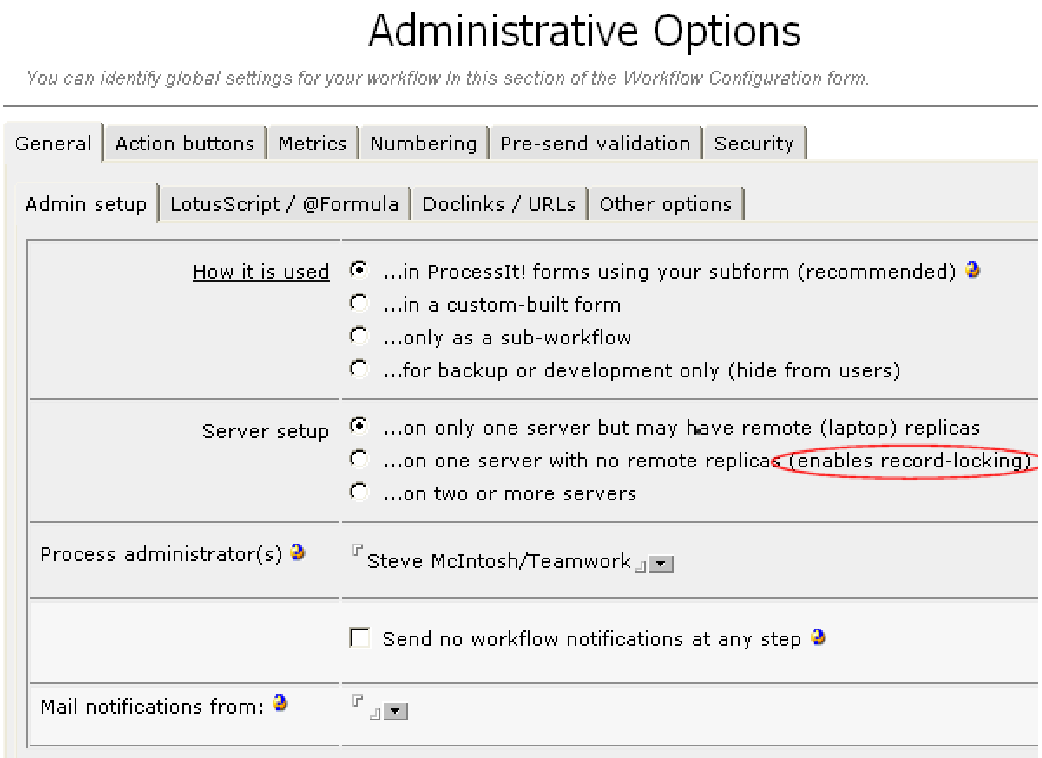
    Starting in release 8.3, the default will be none, forcing users to select a value, but not requiring them to deselect.



22. **New Request Dialog Sorted (Web Only)**
    The "new request" dialog box on the web was sorting choices alphabetically by alias. Staring in this version it is sorted by visible name.

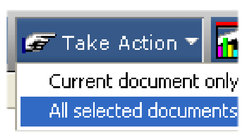


23. **Document Locking Performance Improvements**
The underlying methodology that handles document locking has been improved upon to increase performance.



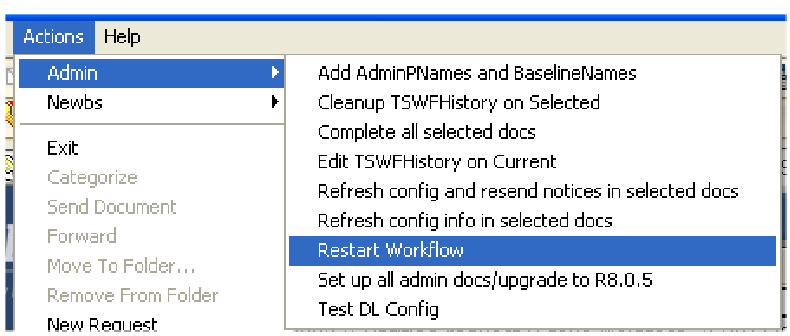
24. **Taking Action On Multiple Documents**
In prior versions, non-administrative users with Author access (the recommended default) could not process multiple documents from the view using the Take Action/All Selected Documents action button. The underlying agent would only process the first document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

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

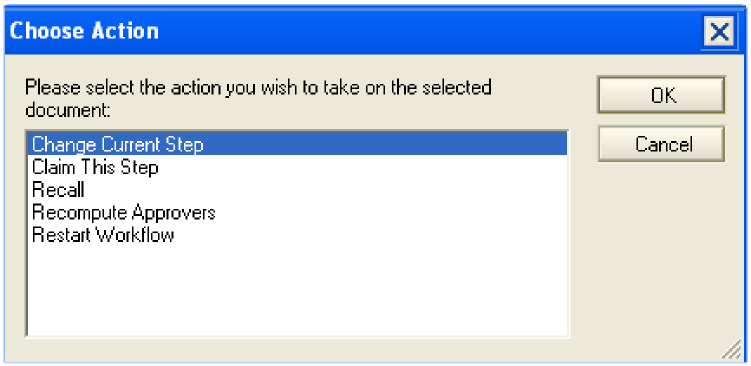


25. **Restarting Workflow on Multiple Documents**
Past versions of ProcessIt could not restart multiple documents when the Actions/Admin/Restart Workflow agent was invoked.

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



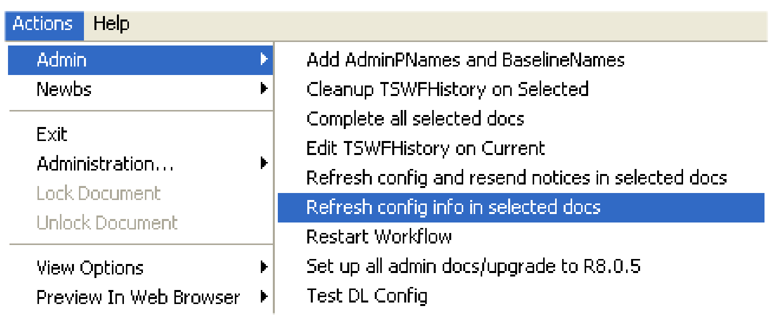
26. **Reloading Logic in Documents Moving Back Through Draft Status**
    In past versions, documents that were either moved back to Draft status, into the first step, or had their workflow restarted did not reload the configuration logic. Starting with this version, any document moving back through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



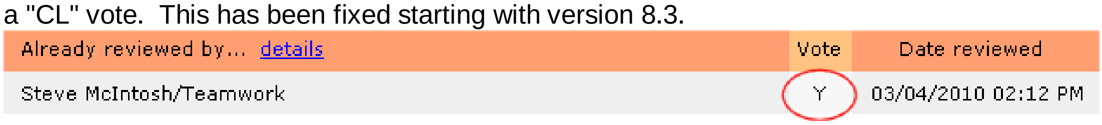
27. **Author Access Error**
    In some limited situations the final approver of a confidential document at an approval step followed by a series of automated steps continued to have Author access until the document was re-saved or moved to another step. This issue has been corrected starting with version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



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"

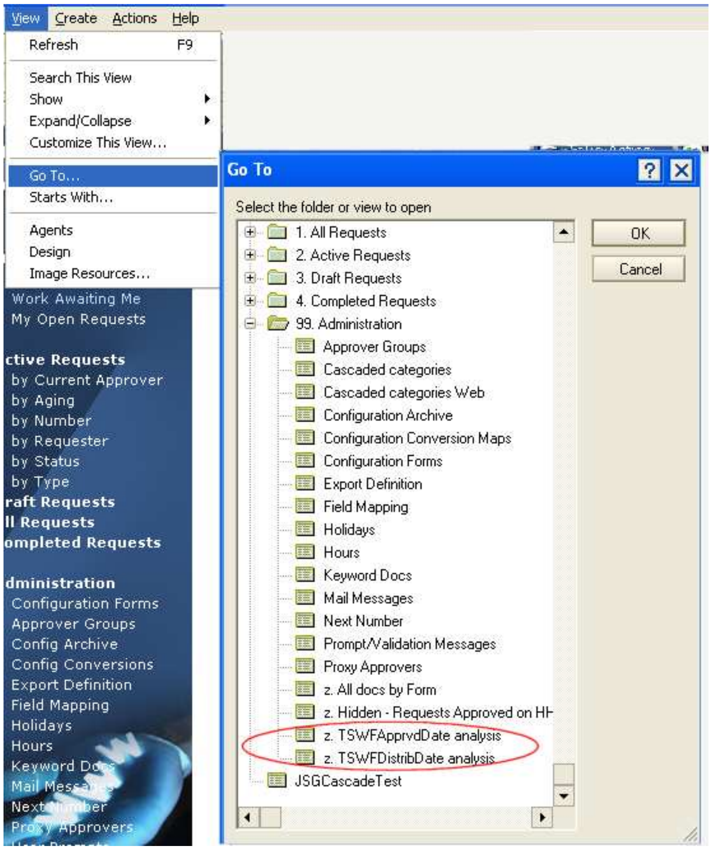
In addition, ProcessIt now includes two new multi-value date fields, TSWFAppvdDTs and TSWFDTs, which will have one date per entry in the TSWFAppvdByWNums and TSWFDistribDate fields, respectively. Because these are date fields, their values are stored as values independent of regional formatting and will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

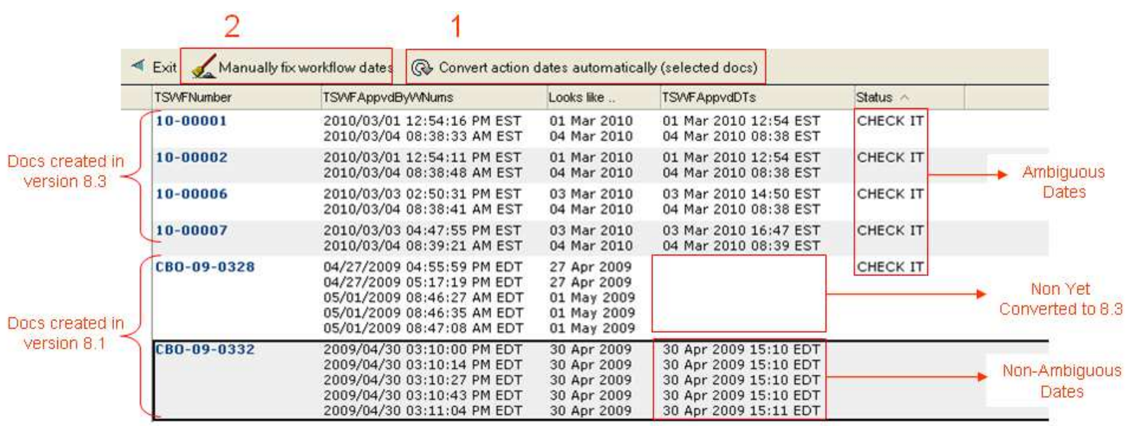
Converting existing data

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.



You can see that the first four documents (10-00001 through 10-00007) show the new date format (YYYY/MM/YY) in the TSWFAppvdByWNums 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.

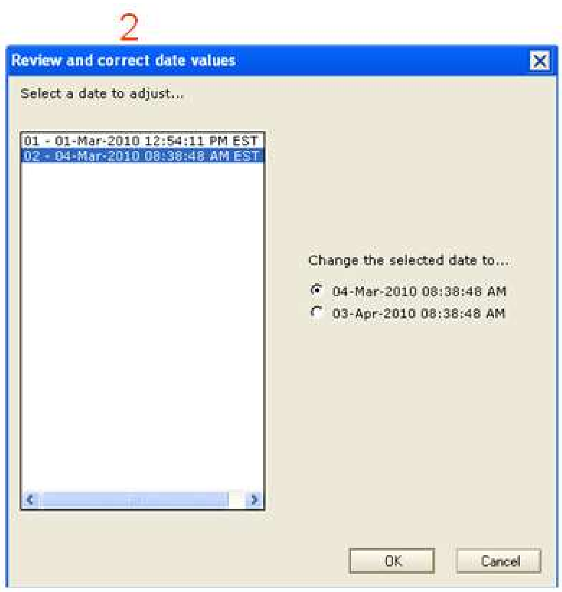
The conversion function **(1)** will automatically convert all date entries in the TSWFAppvdByWNums and create the TSWFDTs field. In doing so it makes a "best guess" at what the actual dates were/assumes the documents were created using the US regional format (i.e., MM/DD/YYYY).

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 <u>all existing documents</u> as part of the upgrade process.

<u>ALSO NOTE: Any customizations based on these fields will require adjustments.</u>