

# GoPro Case Minder Module Release Notes

Version 4.3.0 build 20070615

GoPro Ltd.

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# 1 About Minder Module

## 1.1 What is GoPro Case Minder Module?

The GoPro Case Minder module is a part of the GoPro Professional product line. The Minder module is an add-on to GoPro Case which provides the following functionality:

### Add to Calendar

Create a calendar entry for a Case or document. Set a date/time and the entry is added to the user's Notes or Outlook calendar and an alert sent out in due time.

### Follow-up

Set follow-up (name and date) to a Case or document. On the date set, users are notified to follow up on the Case/document.

### Subscriptions

Subscribe to a Case/document. User is notified whenever the Case/document is modified and when subdocuments are created.

### Search-based subscriptions

The possibility to subscribe to documents that fall under a certain criteria, for example cases of a particular type, or documents with a particular journal key.

### Automatic alerts

Administrators can set up the Minder Module to send automatic alerts when Cases are overdue.

## 1.2 Where to Find the Latest Information

The latest information about GoPro Case Minder Module, including all documentation can be found at the [GoPro Ltd.](http://www.gopro.net) website (www.gopro.net).

## **2 Things You Need To Know**

### **2.1 System Requirements**

Installing the Minder Module using the GoPro Module Manager requires:

#### **2.1.1 Server**

Server requirements according to the GoPro Professional Server requirements.

#### **2.1.2 Client**

Notes client requirements according to the GoPro Professional Client requirements.

### **2.2 Installation**

See GoPro Professional Minder Module Installation Instructions. For further information about installation refer to the [GoPro Ltd.](http://www.gopro.net) website at [www.gopro.net](http://www.gopro.net).

## **3 What's New?**

### **3.1 Version 4.3.0 build 20070615**

#### **Fix: Pasting documents in Minder Module views**

If the setting 'Do not allow pasting of documents into the database' is active in the constants document it now also applies to the Minder Module views.

(T2005-2166)

#### **Check syntax**

The check syntax button has been added to the Automatic Alert form ('Notification settings' tab), to check the syntax of the subject when configured to 'Process subject as formula'

T2007-0401

#### **Document Locking**

The Minder Module has been improved to support GoPro Case document locking.

T2007-0049

#### **Selection sensitive Follow-up view.**

The Follow-up view included in the Minder Module has been improved to be selection sensitive and display only actions according to the configuration in constants document.

T2007-0871

### **3.2 Version 4.2.0 build 20051125**

#### **"Minder" tab renamed to "Notifications"**

The tab used for follow-up and add to calendar functionality in response documents, previously called 'Minder', has now been renamed 'Notifications'.

(T2004-2069)

#### **Document-Subscription view**

The Document-Subscription view has been simplified and updated to meet GoPro standards.

T2005-0256

## **Minder views changed to meet GoPro Standards**

All of the Minder module views have been updated in order to meet the GoPro Professional standards.

(T2005-1946)

### **Fix: "Add to calendar" dialog too small**

The Add to calendar dialog now contains a larger subject field and a new large body field for typing in text into for the calendar entry.

T2005-0073

### **Fix: View names changed**

The view names for the Minder Module views have been renamed and the numbering has been removed. It is done to meet GoPro Case Standards. The names of the corresponding outline entries have not been changed.

T2005-0238

### **Fix: Add to calendar on new documents**

The add to calendar feature is now not available until the document has been saved for the first time.

(T2005-1428)

### **Fix: Previewing minder documents**

When using the preview option in GoPro the Automatic Alert or Alert Definition documents are now not editable from within the preview pane.

(T2005-1531)

### **Fix: Names of those to be notified appearing in canonical format**

In the notification tab of response documents, when selecting names from the NAB button the names appeared in canonical format. This has been fixed and the names are now displayed in abbreviated format.

T2005-0351

### **Fix: Names lookup buttons in Notification tab**

When sending follow-up within a response document, the button for looking up addressed (from the Names and Address book) did not work properly within a response document that was not created under a case. This has been fixed.

(T2005-1884)

## **Fix: Missing column info**

In the Alert Definition view the column info for the 'Uses' column was missing when the FT Search option was selected in the definition documents. This has been fixed.

(T2005-1984)

## **3.3 Version 4.1.2 build 20041229**

### **Search-based subscriptions**

The possibility to subscribe to documents that fall under a certain criteria, for example cases of a particular type, or documents with a particular journal key have been added to the Minder module. These rules can be created from within the Documents/Subscriptions view.

(T2004-2155)

### **Managing document subscriptions**

Previously, when clicking on the subscription button of a document the name of that user was added/removed from the subscription list of the document. This also meant that adding other users than yourself was not an option. This functionality has now been enhanced for users with the ArchiveDep and ExtraArchiveDep roles since they can now add/remove other users as well as themselves.

(T2003-1326)

### **Working days versus calendar days**

A new option, "Working days", can now be used when defining when an alert should send its first notification. This means that weekends as well as holidays are skipped. As an example, a deadline on Monday with a notification on the day before would result in the notification being sent on Friday instead of Sunday.

T2004-0292

### **Creating subscription rules for other users**

In general, users can only create rules that apply to themselves. However, users with the roles ArchiveDep or ExtraArchiveDep can create/modify rules for other than themselves.

(T2004-3363)

### **Subscription view simplified.**

The create actions in the Subscription view have been reduced in order to simplify the view and focus on subscriptions only.

(T2004-3364)

## **FTSearch added to collect documents.**

In the alert definition document, a new option has been added to the "Collect by using" field to collect documents with full text formula. (FT search).

T2004-0615

## **Follow-up recipient field enhanced**

The recipient field of a document follow-up now acts according to the lookup definitions of the constants document. This results in the ability to send notifications to mail-in databases, non-GoPro users etc.

T2004-0215

## **Notes calendar as default**

When using the feature "Add to calendar" and the settings have not been configured beforehand in the user profile module settings for the Minder Module, the action will use Notes as default calendar. If the user is using an Outlook calendar it has to be configured in the user profile.

(T2004-0164)

## **About dialog updated**

The about dialog has been updated to meet the current standard used in all GoPro Professional modules.

(T2004-2208)

## **The Key field hidden**

The Key field in the alert definition document is now hidden, and the Universal ID of the documents used as a key in the background. This will not affect any processes in the module.

(T2004-3170)

## **Alert Definition document simplified**

For better usability and more simplicity some fields in the Alert Definition document have been moved around within the document.

(T2004-3171)

## **Customization: Using custom fields in a Search-based rule**

The search-based rules contain only a basic set of fields on which to base a rule, adding new relevant fields however, is a simple customization process. The results will be that

when creating a new rule or editing an existing one, the custom field(s) will appear in the Condition list, and when pressing the lookup button above the field value a custom form will be opened in a dialog. After selecting the desired value and pressing OK, the selected value is placed in the value field in the rule dialog.

An example:

1. Create a custom form in the Domino Designer that contains the desired lookup options (this form should be made according to the GoPro dialog standards).
2. Create a field named "string" and place the lookup results into that field.
3. Refresh the GoPro design.
4. Go to the module settings of the Minder Module in the Constants document and open up the Subscription tab
5. Click on the "+" button and fill in

"Field text" - Label of the field visible for users

"Field name" - The design name of the field

"Lookup dialog name" - The name of a form with the lookup options

(T2004-3366)

## **Fix: Documents installed with the module**

The content of the Automatic Alert documents that are installed with the module has been updated.

T2004-0327

## **Fix: Checking the last run field.**

Last run field was not initialized properly the first time the agent was run resulting in the agent not running again until the field had been set manually. This has been fixed so the Automatic Alert will now run correctly.

T2004-0371

## **3.4 Version 4.1.0 build 20040616**

### **Frequency field missing.**

A field from the frequency part of the automatic alert definition document was missing, field is now displayed.

(T2004-0479)

## **Follow-up header being displayed without any data.**

The Follow-up header was being displayed in the minder tab even if module options disabled all data for that tab. This has been fixed so the header will appear only if there are one or more fields/actions showing in the tab.

(T2004-0480)

## **License prompt**

When putting a reminder date into a document the license dialog was prompting too much. This have now been fixed.

T2004-0175

## **Add to calendar missing from the Minder tab**

When the Circular Module and Minder Module were both installed in the same GoPro, sometimes the Circular Module options overwrote the Minder Module options making the Add To Calendar feature disappear. This has been fixed.

(T2004-1195)

## **Scheduled minders not running**

Issues where scheduled minders have not been running correctly have been fixed.

T2004-0271

## **Customization of emails sent by minder rules**

A class in a custom library has been added to enable customization of reminder emails just before they are sent.

(T2004-1360)

## **Documents marked for deletion still showing in views**

Minder setup documents, which were marked for deletion, did not disappear from the setup views. This has now been fixed.

(T2004-1397)

## **Using reminder message settings text in calendar alert.**

When using Add to calendar, with no subject entered in the add to calendar dialog box, the Reminder message in the Minder profile settings is used instead when the Lotus Notes alert is displayed. Otherwise the subject typed in the add to calendar dialog box will be displayed.

(T2004-1500)

### **3.5 Version 4.0.2 build 20031219**

#### **Error in Add to calendar view action**

Fixed an error while trying to add a document to the calendar from a view.

(T2003-0477)

#### **Dialogs according to the GoPro Case Professional standard**

The dialogs have been updated to the GoPro Case Professional dialog standard

(T2003-1892)

### **3.6 Version 4.0.0 build 20031030**

#### **User interface changes**

The user interface of the module has been changed in line with GoPro Case Professional.

(T2003-0692)

#### **Reminder functionality added to the Minder Module**

The Minder tab now contains a date field as well as a names list which can be used to send the listed recipients a reminder of that document on the defined date. A doclink is sent.

(T2003-1093)

#### **Increased usability when enabling "add to calendar" function**

Instead of being directed to the user profile document when Minder needs the user to define calendar usage, the Minder module now displays a dialog box asking for the necessary info needed. This info is automatically saved into the user profile document without the user having to open it.

(T2003-1267)

#### **Module settings**

The constant settings for the Minder Module have been made according to the new GoPro Case constant settings standard. To edit the GPC Minder Module constants settings, open the Server's constants document, go to the "Module Settings" tab, choose "GoPro Case Minder Module" from the module list or click on "Refresh module list" if it is not listed. To edit the module constants, click on the "Edit settings" button. This will display a dialog for the settings.

(T2003-0417)

## **License issues**

When the trial period has passed the GoPro Case Minder Module subscription emails and alerts will be disabled and messages displayed stating that the module is unlicensed.

(T2003-0418)

## **User profile settings for the module**

The profile settings for the Minder Module have been made according to the new GoPro Case profile settings standard (a Module settings tab in the profile document). Choose the "GoPro Case Minder Module" from the Module list or press "Refresh module list" if not listed. Then press the "Edit settings" button which displays a dialog for the settings.

(T2003-0500)

## **Create/change alert definition document**

The alert definition document is a document for administrators/programmers to maintain. The alert definition document configures what to do; what documents should be checked for minders, what fields should be compared the date to and possible receivers.

(T2003-0683)

## **Create/Change Automatic Alert document**

The automatic alert document is for super users to maintain. Each Automatic alert document uses one alert definition document (the definition document defines what to do, the automatic alert document defines when to do it). The automatic alert document configures; when the minder should run, how often it should affect each document, the content of the subject and body fields, and who is the receiver of the minder.

(T2003-0684)

## **Create calendar entry as reminder for documents**

GoPro Case kernel element moved to a module. Creation of calendar entries is done in the same way as in prior releases of the kernel.

(T2003-0685)

## **Set followup date on response document**

GoPro Case kernel element moved to a module. Setting a followup date on response documents is done the same way as prior releases of the kernel, but if the GoPro Case Minder Module is not installed the followup field in the settings tab will not be available.

(T2003-0686)

## **Subscribe to a document hierarchy**

GoPro Case kernel element moved to a module. Subscribing to a document is done in the same way as in prior releases of the kernel.

(T2003-0687)

## **Unsubscribe to a Main GoPro Case document**

GoPro Case kernel element moved to a module. Unsubscribing is done the same way as prior releases of the kernel.

(T2003-0688)

## **Unsubscribe**

GoPro Case kernel element moved to a module. Unsubscribe is done in the same way as in prior releases of the kernel.

(T2003-0690)

## **Send a notification to subscribers**

GoPro Case kernel element moved to a module. When a user changes/creates a document or a document in a thread a notification is sent to all subscribers other than the user that changes/creates the document. The notification is sent when the document is closed after the document have been saved at least once.

(T2003-0691)

## **Former followup behaviour created as Minder rules**

Followup is now defined as external rules in the Minder module along with other reminder rules.

(T2003-0888)

## **Subscription overview**

A new feature has been added for subscribers. A view have been added to the GPC Minder Module wich shows all subscribers and wich documents they are subscribed to, categorised by document type.

(T2003-0999)