

Phases Module Release Notes

Version 4.3.0 build 20070615

GoPro Ltd.

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1 About GoPro Professional Phases Module

1.1 What is the GoPro Professional Phases Module

The GoPro Professional Phases Module is a part of the GoPro Professional product line. It is the newest version of GoPro Phases Module. The GoPro Professional Phases Module is an add-on to GoPro Professional which provides the following functionality:

- User have a possibility to divide cases of a particular type into a set of predefined phases.
- Each phase's responsibility and access can be individually configured.
- When a case of this type is created it automatically includes a set of phase documents.
- All documents and correspondence regarding the case can be categorised by creating them beneath one of the phases.
- Phases' status can be automatically changed depending on previous phases or changed manually.
- Phases are very flexible and can be configured to suit most needs.

1.2 Where to Find the latest Information

The latest information about GoPro Professional Phases Module and the GoPro Professional product line, 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 Requirements

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 and setup

See GoPro Case Phases Module Installation Instructions.

NOTE! Make sure to insert Phases subform in correct GoPro Professional add-on subforms (see Phases Installation Instructions).

3 What's new?

3.1 Version 4.3.0 build 20070615

Fixed an object variable not set error

In some instances where the field '_ExtraViewIcon' is removed or is not available in phases, an error occurred when the phases were saved. This has now been fixed.

T2006-0470

3.2 Version 4.2.0 build 20060113

Fix: Phases not created when case created from template

When using the view action 'Register case from template' the phase documents were not generated. This has now been fixed.

T2005-0546

Fix: Performance issues when saving case

Performance has been optimized when saving cases involving phases.

(T2005-2298)

Fix: Phase generated from case wizard

Fix for build 20051207 (T2005-0546) had side-effects for phase generation when phases were generated after saving a Case directly from the Case wizard. This has now been fixed

(T2005-2374)

Fields for backend process

Hidden fields for backend processes have been added to the phase documents

T2005-0575

Completing a step

When completing a step that has already been completed, without activating the step, a new record was added to the action log. Now it is not possible to complete a step twice without activating the step first.

(T2005-2406)

3.3 Version 4.2.0 build 20051216

Fix: Phases not created when case created from template

When using the view action 'Register case from template' the phase documents were not generated. This has now been fixed.

T2005-0546

Fix: Performance issues when saving case

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(T2005-2374)

3.4 Version 4.2.0 build 20051207

Performance issues when saving case

Performance have been optimized when saving cases involving phases.

(T2005-2298)

Fix: Phases not created when case created from template

When using the view action 'Register case from template' the phase documents were not generated. This has now been fixed.

T2005-0546

3.5 Version 4.2.0 build 20051125

New features for creating phases

For phase creation in general there are now 3 options to choose from instead of 2:

- Manually create phases with preceding phases (Same as when checked in "Create only active phases")
- Create all phases when Case is created (Same as when not checked in "Create only active phases")

- Create phases automatically when preceding phases are completed (This is a new feature in which only the phases that should be active are created in the beginning. Then additional phases are automatically created one by one depending on those that become completed).

(T2003-0127)

Deadline in working days

The deadline of a phase (configured in the phase definition document) can now use working days as well as calendar days.

(T2004-1976)

Ability to create a new phase "on-the-fly"

Phase editors (users with [PhaseEditor] role) can now create non-predefined phases on-the-fly as needed. In order to do so, a new action "Tools-Create new phase" is now available within the case document. This action opens a Phase Wizard that helps the user to either create a single phase from scratch or to select a set of pre-defined phases to create.

T2004-0589

Minder and Review tabs

Tabs for Minder and Review Modules have been added to the phase document

(T2004-2900)

Mark phase definition documents for deletion

A view action to mark documents for deletion has been added to the Phase type view. Documents marked for deletion disappear from the phase type view.

T2004-0629

Information in phase document header updated.

The standard information visible in the phase document header has been updated to meet the GoPro standards.

(T2004-3246)

Phase instructions improved

Phase instructions have been improved and are now similar to the case instructions being currently used in case documents. This will, among other things, fix an issue where commas within the instructions resulted in the instructions being separated into multi-value

instructions.

T2005-0116

Creating external documents

The form action "Document" within a phase now contains the option to create an External document.

T2005-0255

Hiding diagram button in phase documents

Hiding the activity diagram has been added as a new option to the Phase Type document. A checkbox is now available in the "Activity diagram" tab which allows the phase administrator to hide the activity diagram button in phase documents. This defaults to hiding the activity diagram for new Phase Type documents.

(T2005-1479)

"Recreate phases" action changed

The former case function "Tools...Recreate phases" has been removed and merged into the new Phase Wizard available in "Tools...-Create new phase".

(T2005-1731)

Phase type

The user interface of the Phase Type document has been improved in order to simplify the interface as well as make room for a number of new features that are documented in other tickets.

(T2005-1920)

New workflow features

The task lists have been greatly enhanced in order to create a user friendly workflow. In order to do this the Phase Definition document now contains a new tab for defining the workflow and when this option is in use a new "Workflow" tab will appear in the phase documents themselves - and this tab will by default be in focus when a phase document is opened. The workflow options are as follows:

- None No workflow or task list will be used
- Simple A simple task list will be available - the same tasklist as in previous versions of the Phases Module

- **Advanced** When using the advanced workflow a new tab called "Workflow" will appear in the phase document containing a predefined number of steps to complete. These steps (up to 9 steps for each phase) will appear on the right side of the workflow tab and within them the administrator can define a Header, Instruction text, Clarification (small print), Help and an Action. On the left side a list of actions can be made available for general purpose (standard actions as well as customised actions)., the standard actions include Back-Next navigation between phase documents as well as a Correspondance action to create new documents.
- **Custom** This is used when customisation of the workflow is needed. A subform is included that contains all the basic elements of the workflow as well as the ability to use the standard step definitions as well (editing the header, instructions and clarification).

(T2005-1927)

Performance enhancements

A number of performance issues have been tested and improved considerably.

(T2005-2143)

Customisation: API error support

More support to error handling has been added to the API script libraries.

T2003-0270

Customisation: Backend API agent created to create phases.

A new agent (nAPICreatePhases) have been created for customisation purposes. The agent creates phases according to the case type of the document sent as Parameter. This agent is used when the SaveCase function from the GoPro API is called.

(T2004-3254)

Customisation: Increased support to the Phases Module by Go-Pro APIs

The possibility to create phases when saving Cases has been added to the SaveCase() function of the GoPro API.

(T2004-3373)

Customisation: Change responsible employee by API

By using the `set_responsible_employee` from the `libPhasesAPI`, it now makes the new responsible employee as an author of the phase he/she becomes responsible for. The function also recalculates the view text as well.

(T2005-0862)

Customisation: Installation of Review module no longer required

Installing the Review Module is no longer mandatory when using the phase APIs.

(T2005-1461)

Customisation: Functions using UI calls moved to libPhasesAPI

Because of background features that have been added to GoPro and creation of phases, some functions, using UI calls, have been moved out of the `libPhases` script library and put into the `libPhasesAPI` script library.

T2005-0292

Fix: Sort order of phases in views

The sort order of phase documents was not exactly the same in all views, within lookups etc. This has been addressed and should now everywhere be displayed sorted by the name of the phase.

(T2002-0357)

Fix: Wrong view icon when a phase is declined.

When a phase document is declined the status icon in views still displayed a green checkmark instead of a red X. Now when a phase is declined by a review, a red X icon is displayed in views.

(T2003-1089)

Fix: Involved party not updated in phases

When involved party in the parent Case was changed, there was no practical way to update the involved party within a phase. Now, the involved party within the phase will be updated when the phase document is saved.

T2004-0263

Fix: Phases can now only create contacts links

In previous versions of GoPro, trying to link a case to a phase in the "Links" dialog within the phase resulted in an error message. Now the dialog only displays the option to add a

contact link to a phase, not to add case link.

(T2004-1590)

Fix: Task list appearing in view text

If tasks were added manually to a phase it could result in the task list being displayed in the view text of the document. This has been fixed.

(T2004-0009)

Fix: Status of phases in views

The phase status is only displayed in views when the phase depends on a certain status to be completed.

(T2005-2191)

3.6 Version 4.1.1 build 20040930

New tab in the phase definition document - History

In order to make a change log available (in the same way as with other documents) a history tab has been added to the phase definition document.

(T2004-1834)

New role - PhaseManager

A new role has been added to the Phases Module, the [PhaseManager] role. Users given this role will be able to change the person responsible for each phase.

(T2004-1853)

Improved performance

The Phase form has been optimized in order to speed up the opening of a phase document.

(T2004-1910)

Support for My Place

Support has been added to the Phases Module so that phase documents can be made available in the MyPlace module.

(T2004-0021)

Customization: The Phases API functions published on the web

The GoPro Case Phases API script library function syntax has been published to the web and can be viewed at the same location as the kernel API (www.gopro.net/GoProProfessionalAPI). This URL is also available in the GoPro Professional Customization Guide.

(T2004-1928)

Customization: Script library structure simplified

For those customers using the Phase API functions, or any customization to the phases, the script libraries have been simplified. Currently there are only two script libraries to use for the phases module, the libPhases and libPhasesAPI. Note that if current customizations have been using either the libPhasesNotes or libPhasesWeb, the function of those libraries have been moved to the libPhasesAPI library. The appropriate changes to the library references have to be changed accordingly.

(T2004-1854)

Fix: Case type as the default trigger for phase creation

In version 4.1.0, new features were introduced in GoPro Case, features like Case Categories and Case Templates. One of the options of the Case Categories was to define which Case Template and Phase Type to use when creating a case of that category. In order to support these new features the Phases constant dialog offers the possibilities to decide the trigger point for the creation of phases, either being the Case Type (as before) or the new Case Categories. However, in those circumstances where these values were not present in some additional constants documents (like in local replicas) the triggering method became undefined resulting in no phases being created. This has now been changed so that if no trigger is defined the case types will be used as default.

(T2004-0017)

3.7 Version 4.1.0 build 20040616

Finishing phase when a task list is finished

Phases did not finish when the task list is finished and the definition document is configured to do so. This has been fixed.

(T2003-1727)

Default value of status options in phase definition.

The default value of Phase statuses have been changed to "Use case statuses" since that choice can be used without any additional changes. The case status list document comes default with a GoPro Case Professional database.

(T2004-0407)

Module Settings added for using the case categories.

A module settings dialog has been added to the constants document for configuring phase creations from cases. Now it is required to choose between case type (as before) or case categories (new) when creating phases from a case document. When choosing to create phases from case type, then phases are created in the same manner as before. However, when choosing to create phases from the new case categories the following configuration has to be in place:

- In the constants document, the advanced case categories have to be in use
- In the case categories, create/configure a case category to use a phase type.

Then, when creating a case and a case category containing a reference to a phase type is selected, the phases are generated when the document is saved. (Note that when selecting to the use case categories the Phase type document will stop adding its name to the case type list document.)

(T2004-1298)

Custom header

Custom tab header is now not visible when no custom fields/text are in use.

T2004-0196

Journal keys in phase documents now working as expected

Support added to the Journal Keys Module within the phase documents.

(T2004-1455)

Support to the Review Module

The phase module has been updated to support the GoPro Case Review Module with the same functionality as the GoPro Case Approval Cycle module.

(T2004-1462)

3.8 Version 4.0.2 build 20031219

Dialogs according to the GoPro Case Professional standard

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

(T2003-1893)

3.9 Version 4.0.1 build 20031106

Fixed a bug when using Finish_Phase API call

When using the Finish_Phase function a message is displayed saying that the Phase Definition document were not found. If a new phase were created after the Finish_Phase of the prior phase, the new phase were still created successfully. The message refers to phases already existing when the phase engine were updating the other phases.

(T2003-1459)

3.10 Version 4.0.0 20031030

User interface changes

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

(T2003-0695)

Approval cycles integration

When Approval Cycles are installed, the approval cycle options appear. A new option, to require approval in order to finish a phase has been added as well. This option makes sure that if an approval cycle is required for the phase, the phase can not be finished unless the approval cycle has been finished and approved.

(T2003-0793)

Changing phase responsible

Fix in changing phase responsible. Those allowed to change the phase responsible are: (1) Case responsible (2) Phase responsible and (3) those with the Administrator role.

(T2003-1151)

Change of terminology

Case type is now known as Phase type and Phase Settings are now known as Phase Definition.

(T2003-1203)

Opening the custom tab by default

When a custom subform has been added to a phase and the custom tab needs to be open by default, the way to do it is to add a computed field called \$MainTable (Case sensitive) to the custom subform with the value "Custom". By doing that the custom tab will be opened by default.

T2003-0427

Improvements in addings tasks to the tasklist

Adding a new task to the current tasklist of a phase is now done by pressing a button and writing the new task into a dialog. This way, many new tasks can be added at the same time without having to save and close the phase in between.

(T2003-1286)

Phase instructions

Phase instructions have been added to the phase document and have the same goals for the phase as the case instructions have in the case document.

(T2003-1357)

Installing Approval Cycles Module mandatory if using the Phases API

In order to use the phases API libraries installation of the Approval Cycles Module is mandatory. This does, of course, not apply to customization which is not using the phases API.

(T2003-1429)