

GoPro Case Review Module Release Notes

Version 4.3.0 build 20070615

GoPro Ltd.

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1 About GoPro Case Review Module

1.1 What is the Review module?

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

- The Review Module provides an organised, yet modifiable way to send a document to a group of people for review or approval.
- Documents can be sent to approvers/reviewers using a **parallel** (all group members at the same time) or a **serial** (one after another) method.
- Approvers/Reviewers automatically receive an e-mail informing them of a document awaiting their review or approval. The email contains a link to the document which the users can click on to open the document directly.
- Receivers can approve or reject a document and the relevant parties are informed of their decision automatically.

1.2 Where to Find the latest Information

The latest information about GoPro Case Review 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 System Requirements

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

3 Migration

3.1 Migrating from version 4.0.x to 4.1.x/4.2.x

Version 4.1 introduces major changes to the "Review Module" (formerly known as "Approval cycles Module"). In order to upgrade current reviews and review definitions the following steps must be executed:

1. Go into the constants settings dialog for the Review module (available from within the constants document)
2. Select the "Upgrade" tab
3. Click on "Upgrade old approval cycle documents"

Note you must have the ArchiveDep role to successfully run this action.

This will go through all the review documents in the database and upgrade them to the new version.

4 What's New

4.1 Version 4.3.0 build 20070615

Send notification of a case created in the background.

When customizing a review with a new case that is created in the background code and the notification is then sent, an error occurred. This has now been fixed.

T2005-0529

Approver button not appearing in custom forms

In custom forms when the first reviewer is not the same as the starter, and the review is started in querysave then the Approve buttons do not appear. This has now been fixed

(T2006-0086)

Error in send back action

When the user added a comment after using the send back action, an error occurred. This has now been fixed.

T2006-0044

Subject field doubled in each notification sent to approver.

When a user is sending a message to approver, the subject field always appended its content to itself. This has now been fixed.

T2006-0235

Empty field using field defined users.

When a field is empty, using field defined users, an error occurred. This has been fixed and now empty fields are now skipped instead of resulting in errors.

T2006-0242

Review manager approving for third party is prompted.

When a review manager is approving for another user, with more than 1 users left to approve, the review manager is prompted, with user to approve for.

T2006-0254

Document Locking

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

T2007-0050

4.2 Version 4.2.0 build 20051125

Customisation: Added agent to create review

Support for phases and customization has been included in an agent `nApiCreateReview` which can be used to put a document into review. The field `doc_ApprovalCycleName` is used to hold the name of the review.

(T2005-1147)

Customisation fix: Review Restart duplicates reviewer

When using the custom function `ReviewRestart` the first reviewer was duplicated. This has been fixed.

T2005-0126

Customisation fix: Error when using only 1 reviewer in a custom form

When using 1 reviewer in a custom form, a "subscript out of range" error occurred. This has been fixed.

(T2005-1715)

Fix: Mark for delete action missing

The mark for delete action was missing from the Setup-Review view, this action has now been added to the view.

(T2005-0584)

Fix: Comment dialog doesn't cancel approval/rejection on cancel

When approving or rejecting a document, a pop-up box appears asking you to enter a comment. By clicking Cancel or Close in this box, the document is still approved or rejected. This has been changed in the way that by clicking on Cancel or Close everything is now cancelled properly.

T2005-0305

Fix: Error when delegating reviews

When using the Delegate button in a parallel review, an "Object variable not set" occurred. This has been fixed.

T2005-0309

Fix: Error when including an external party in a review

When sending a document for review to an external party and the mail contained attachments the following error was displayed: "Instance member EMBEDDEDOBJECTS does not exists". This has been fixed.

(T2005-1552)

Fix: Review subject for phases too long

When putting phases into review, the subject line becomes very long and difficult to read in views. This has been addressed.

T2005-0412

Fix: Difficult to uninstall the module

When the Review Module had been uninstalled its name was still visible in the "Modules" list within the constants document. This has been fixed.

(T2005-2179)

Fix: Body text still locked after approving

An issue was reported when using the option to lock the contents of the body field. Using the option "Approve for all" resulted in the body still being locked even though the review was finished. This has been fixed

(T2005-2178)

4.3 Version 4.1.2 build 20050128

Deadlines can be based on either calendar days or working days.

When selecting the number of days before a reviewer's deadline it is now possible to select either working days or calendar days. For example when using working days, a 2 day deadline activated on a friday would mean next tuesday instead of next sunday. Please note that working days are based on entries in the Names&Address book on the server and can include public holidays as well.

(T2004-1977)

Defining default value for "Lock document contents" in review wizard

It is now possible in the constant dialog to select the default value for the "Lock document contents" value in the review wizard.

(T2004-1981)

Ability to add a "wildcard" reviewer to a pre-defined review)

When creating a pre-defined review cycle and selecting a new reviewer to participate in the review, a new option has been added to the "other" button. This option, called "Select user", makes it possible not to predefine the name of the person who will be participating in the review but instead to ask the user (when the review is started) to select the person to participate in that step of the review.

(T2004-2622)

Including requester in notification emails

An option has been added to notify the requester if any reviewers fail to meet their deadline (by including the requester as a recipient when sending deadline notifications).

(T2004-2995)

Ad-hoc reviews simplified

When adding reviewers to an ad-hoc review, the administrator can optionally hide the following features in the "Add reviewer" dialog:

- "External" button
- "Other" button
- "Role" field
- "Status" field

(T2004-3102)

”Approve for all” notifies all approvers

When a review manager approves on behalf of everyone in the review, a notification is now also sent to all the reviewers (since the manager is in fact approving on their behalf) - not only to the requester.

(T2004-3111)

Setting default value for deadline

From within the constants dialog it is now possible to set a default value for the number of deadline days, this value was previously always set to be 5 days.

(T2004-3113)

”Send notification” option removed from Review wizard

The action to send a notification that previously was one of the three available options of the Review wizard has been removed from the wizard. As before, the notification action is still available from the tools menu of all documents.

(T2004-3117)

Optional list document for reviewer role

When selecting the role of a reviewer the roles available came from the CaseRoles list document (meaning that the same list of roles were used when linking clients to a case as well as choosing the role of a reviewer). Since the same list of roles doesn't always apply, a new list document, ReviewRoles, can now be used for defining the roles of the reviewers. Please note that if this list doesn't contain any entries, the CaseRoles list will be used instead.

T2004-0699

Customization: Logic moved from QueryClose to QuerySave

In order to make customization easier all review logic has been moved from QueryClose to QuerySave

(T2004-2698)

Customization: Now possible to modify notification email

Before a notification email is sent, the option to change the notification email through customization is now possible.

T2004-0630

Customization: Hiding individual actions (buttons) now possible

It is now possible to hide the various action buttons (Add reviewer, Send back, Delegate, Send memo to approver, Send memo to requester) using a custom field. Please refer to the GoPro Professional customization Guide for implementation details.

(T2004-3238)

Fix: Access control of review documents

When putting a document into review the review document itself is now populated with the same access control as the parent document (but also including the approvers and review managers).

T2004-0714

Fix: Approval/rejection by review managers logged using a wrong name

When approving or rejecting a document on the behalf of someone else (as the review manager) the decision was logged as being done by the current reviewer. This has been fixed so that the name of the actual person performing the operation is now being logged.

(T2004-2464)

4.4 Version 4.1.1 build 20041103

Requester is now a full-fledged participant of the review

In order to better support the dialog between the requester and reviewers (approvers), the requester is now automatically added as the first reviewer to any review. This way the "Send back" action will allow interaction between the first reviewer and the requester as well as between the dedicated reviewers themselves.

(T2004-2812)

New role disabling ad-hoc reviews when needed

A new role, "[NoAdHocReview]" has been added to the module enabling the administrator to restrict access to putting a document into an ad-hoc review (allowing only pre-defined reviews to be used).

(T2004-2813)

Customization: Additions to the Review API

The functions ReviewRestart, ReviewApprove and ReviewReject have been added to the Review API. All APIs are available on www.gopro.net - please refer to the Customization Guide.

(T2004-2810)

Customization: Possibility to hide the review tab

In order to make it possible to hide the review tab completely based on a field value the review tab now checks the contents of a field called "ApprovalHideReview". If the contents of this field is "1" the Review tab will not be visible.

(T2004-2811)

4.5 Version 4.1.1 build 20041014

Comments for approval/reject now stored also in comment tab

All comments entered when approving/rejecting now also appear in the comments tab as well as in the history tab. Extra comments are always added to the comments tab.

(T2004-2564)

Document not closed any more after approving

Previously when the user approved a document the document was closed. The document now is refreshed but not closed.

T2004-0545

Customization: Improvements in the custom review form

In order to make review customization even more flexible the following enhancements have been made to the custom review form:

- The custom fields, defined in the constants dialog and therefore appearing in the review definition, only supported one reviewer per field - these fields now support multiple values so that multiple reviewers can be added this way. Note that the same setup definition applies to all the reviewers within the field.
- The "subApproval" subform now displays "Get review" button when no custom review is specified in the "Approval_Name"

(T2004-2532)

Customization fix: "Start review" button not displayed

The "Start button" was not appearing in custom review forms the first time a review was created and not started This has been fixed.

(T2004-2621)

4.6 Version 4.1.1 build 20040924

New review option - confirm

Sometimes the need arises to send a document for confirmation only, not for approval. Users are to confirm that they have seen and read a document and their confirmation is logged. This behaviour is now supported by the Review Module. A special confirmation review can now be created, working like a normal parallel review, but instead of the user being presented with the options to approve or reject the only option is to confirm the document.

(T2004-1723)

Support for external registry

One of the new features in GoPro Case Professional 4.1 version was the definition of an external registry for client list lookups. In the previous version of the Review Module this feature was not supported, resulting in the GoPro Case local client list being the only one available to use when selecting external reviewers. This feature is now fully supported by the so that when GoPro Case itself is using an external client list the same list will be available to the Review Module.

(T2004-1703)

Seperate tab for comments

In previous releases of the Review Module, comments were added to the review history. This has now been split up into 2 tabs, one for general review history and a seperate tab for user comments.

(T2004-1657)

Tabs reversed for increased usability

"Comments", "Reviewers" and "Review History" tabs have been reversed for increased usability.

(T2004-2191)

Customization: Performance improvements in custom forms.

The implementation of approval has been changed and functions like computeWithForm and formulas for field calculations are not being used at all. Everything has been moved into Lotuscript resulting in much better performance.

(T2004-2172)

Customization: Support for selecting custom review after the creation of a document

To better support customization using reviews the possibility to select a review AFTER a custom form has been created instead of only when the custom form is created is now supported. The name of the review to use should be inserted into a field called Approval_Name which will activate that review on document save.

(T2004-2220)

Fix: Send notification - "Previous" button in wizard

When launching the notification action from the tools menu a button called "Previous" appeared without any use. It has been removed.

T2004-0377

Fix: Review documents showing empty brackets in GoPro views

Review document displayed empty brackets "[]" when the status was not specified. This has been fixed so that nothing will be displayed when status is empty.

(T2004-1961)

Fix: Followup email being sent to users who have already approved.

When executing a parallel review a followup email was sent to all those having a deadline instead of only to those that still hadn't approved. This has been fixed.

(T2004-2170)

Fix: Reviewer can't approve when using an alias

When a user with a defined alias in his profile was selected to participate in a review he/she wasn't able to participate in the review. This has been fixed so that the alias can't be selected when adding reviewers, only a fully qualified Notes name.

(T2004-2291)

4.7 Version 4.1.0 build 20040616

Possible to create a review on the fly

It is now possible to create a review of a document on the fly. The review wizard supports putting a document in a review created in the review wizard.

(T2003-1029)

Possible to approve a document in read mode

In the previous version the actions to approve/reject a document only became accessible when the document was in edit mode. Now it is possible to approve a document even if still in read mode.

(T2003-1063)

Module name changed to Review Module

For this major upgrade of this module the module name will now reflect a more general usage since the nature of the module is to review documents in general, not exclusively get approvals. For these reasons the name has been changed from GoPro Case Approval Cycles Module to GoPro Case Review Module.

(T2004-0080)

Lock document when in review

There is now an option in the review to lock the body field when the document is in review, that way it is guaranteed that the text is not being modified while the document is in review

(T2004-0432)

Review information is now accessed through the main document

Review information is now accessed through the main document. Instead of inheriting the main document into a response document and approving that document, the approval information is now stored in a response document but all actions are carried out in the main document. From the perspective of the users he is always working with the main document.

(T2004-0883)

Review Wizard

When creating a new review a wizard dialog is used. The wizard supports using predefined reviews as well as creating reviews on the fly

(T2004-0884)

Support for external users in review

There is now support for using external reviewers in a review. The way it works is that a GoPro user is defined as being the handler for the external reviewer. The handler and the external reviewer both get an email. The GoPro user then handles the approve or reject from the external user.

(T2004-1028)

Option to start versioning in a review (Versioning Module)

If the Versioning Module is present, the review setup form now has an option to automatically activate versioning on a document being started in review

(T2004-1158)

Administrator is notified whenever an errors occurs in review

If an error occurs in a review, for example the next reviewer could not be located, an email is sent to the administrators of the review with enough information to correct the problem

(T2004-1269)

Upgrading from an older version

It's possible to upgrade from older approval cycle by using the upgrade button in the module constants dialog

(T2004-1304)

Enhanced feature set for a document in review

The document sent for review is now the actual document, not a copy of the document as before. This way, all the review actions available to the user are accessible from within the in-review document which simplifies all usage. As well as being able to accept or reject a document, now additional features are available, like:

- Send back - The document is sent back to the last approver for re-approval.
- Delegate - The decision to accept/reject is delegated to another user.
- Add reviewer - An additional reviewer can be added either before or after the current approver.
- Send memo to requester - When insufficient information are at hand in order to make a decision the user can send a memo to the requester asking for further info.

(T2004-1444)

Notifications

Similar behaviour as the standard Lotus Notes Mail feature, that is available by doing:
`CreateMailSpecialLink` Message

(T2004-1445)

The reminder email now includes the review name

When an email is automatically sent in order to notify the next reviewer that a document awaits him, the email now includes the name of the review as part of the subject.

T2004-0332

4.8 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

(T2003-1908)

4.9 Version 4.0.0 build 20031030

Interface changes and increased usability

The approval cycles have undergone usability and interface changes according to the new user interface of GoPro Professional.

(T2003-0694)

Approval cycle agent definitions moved to the GoPro constant document

Enabling and disabling the approval cycle agent is now done using a module constant document which is accessible from the Modules tab of the GoPro Case constants document.

(T2003-1218)

Client crashes when trying to approve company/contact

When trying to use the approval cycle on a Company or a Contact it can result in a client crash. This is a Lotus Notes version 5 issue and is not a concern for users of version 6.

(T2003-1401)

Approval cycles now hidden when printing

Removed the printing of approval cycles. They only exist on the screen now. For printing a special subform with print display fields needs to be added.

(T2003-0297)

Fixed addition of new approvers in approval setup

New approvers are now added in the correct order when using the New/Insert buttons in the approval setup.

T2003-0251

Approval cycle functionality moved from GoPro case to an installable module

Approval cycles are now a separate module, not included in the GoPro Case kernel.

(T2003-0659)

Fixed approval deadline date

Fixed problem where approval deadline was moved forward each time the document was saved on a new date.

(T2003-0903)

Enabling of the approval cycle agent

Approval cycle agent settings have been moved to the approval cycle setup dialog.

(T2003-0995)

5 Troubleshooting

5.1 Notes client crashes

Notes client crashes when trying to approve company/contact document

On versions older than version 4.1.0, when trying to use the approval cycle on a Company or a Contact, it can result in a client crash. This happens because of a bug in Notes 5 when a complex form is rendered into a rich text field. This is a Lotus Notes version 5 issue, and is not a concern for users of version 6. See ticket T2003-1401