Therefore BPMS Version 7 Release Notes

Public >>> Default / Welcome Screen

1. If cookies or JavaScript has been disabled, disable the "Sign In" and "Forgotten Password" buttons.
2. Revise the "JavaScript not enabled" notice text.

Public >>> Sign In screen

1. Introduce optional Two Factor Authentication (2FA) should it have been activated via the Password Rules screen and subsequently activated by the User on the "My Password" screen.
2. Revise public "Sign In" page text to accommodate for the introduction of 2FA.
3. Introduce an optional Sign In screen "Cookie Notice" that can be activated / deactivated via the "Password Rules" screen.

Dashboard >>> Dashboard option

1. Add a "Responses for My Review" Dashboard Quick Link which redirects the user to the new "Responses" tab.

Dashboard >>> Performance option

1. Ensure that the "Performance" option's data elements can be shown / not shown as dictated by the options selected for exclusion on the signed in user's Security Group. The data elements that can be excluded via the signed in user's Security Group are as detailed below …
    a. Open Tasks that I need to Process / Manage
    b. My Department's Open Tasks by Classification
    c. My Department's Open Tasks by User
    d. Open Portal / My Company's Open Tasks by Task Type

Dashboard >>> Contact List option

1. Resolve an error that occurred if there was uncommitted and non-viable search text in place when the "Envelope" icon was clicked.

Tasks >>> Availability of Tab / underlying Options / Welcome Text

1. Perform a "Welcome" text review / make it contextually dynamic.
2. Revise the rules that result in the display of the Tasks tab so as to enhance ease of system use.
    e. Accommodate the new "Hide Tasks tab if no options have content" configurative option that has been added to the "Activate Optional Features" screen.
    f. Accommodate the new "Hide Tasks tab options without content" configurative option that has been added to the "Activate Optional Features" screen.

Tasks >>> Thread Checks

1. Add a "Missing Additional Reference Narration" Thread Check.

2. Add a "Missing Document Date Narration" Thread Check.
3. Add a "Missing Point of Presence Description Narration" Thread Check.
4. Add a "No Points of Presence Allocated to Thread Type" Thread Check.
5. Add a "Can't allocate a Point of Presence to Thread Type" Thread Check.
6. Add a "No Entry Types" Thread Check.
7. Correct an error found with the "Missing Document Value Narration" Thread Check.
8. Make various refinements to Thread Check text.

Tasks >>> Create / Update / Base Data Screens

1. Add the following new data fields and ensure that they are configurable as per Therefore ThreadBuilder™ controls …
    a. Point of Presence (In "Company" section)
    b. Additional Reference (in "Founding Document" section)
2. Revise "Company" heading to make it dynamic such that Point of Presence is referenced where appropriate.
3. Revise "Company" instructions.
4. Revise the way in which Points of Presence / Companies are default allocated to tasks / queries by implementing the following configurative override variables as managed via the "Base Configuration" screen
    a. Tasks default allocated to Primary Company
    b. Tasks default allocated to Primary Point of Presence
5. Implement an "Additional Reference" duplicate checker which is configurable via the "Activate Optional Features" screen.
6. Introduce the following "button centric" functionality …
    a. If the "Primary Company Only" option on the ThreadBuilder's Entry level "Buttons" tab has been selected, the button under question is only to be visible to Primary Company users.
    b. If the "Non-Primary Company only" option on the ThreadBuilder's Entry level "Buttons" tab has been selected, the button under question is only to be visible to Non-Primary Company users.
    c. If the "Redact" option on the ThreadBuilder's Entry level "Buttons" tab has been selected, the Entry details will be redacted via the Task Review should the button under question have been clicked.
    d. If the "Attachments Optional" option on the ThreadBuilder's Entry level "Buttons" tab has been selected, mandatory attachments will be rendered optional in the case of the button under question being clicked.
7. Introduce functionality such that the following fields can be redacted (i.e., Only visible to Primary Company users) if the corresponding "Redact" option has been selected on the ThreadBuilder's "Details" tab …
    a. Short Description
    b. Long Description
    c. Short Text
    d. Priority
    e. Date / time
8. Introduce functionality such that individual "Attachments" can be redacted (i.e., Only visible to Primary Company users) should the corresponding attachment be selected for redaction.
9. Implement an optional advanced / jQuery file uploader which is activated / deactivated via the "Review and Utility Screen Options" screen found in the "Site Setup" section.
10. Introduce the following new "Date / Time" config options, as set via the ThreadBuilder's Entry Level "Details" tab, to the "Date / Time" field carried on the Create / Update screen …
    a. Date Only (Do not display time)
    b. Allow Past Dates (Allow historic dates to be captured)

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11. Introduce the "Set as per parent Task" config option, as set via the ThreadBuilder's Thread Type level's "Company / POP" tab, to enable child tasks to be automatically linked to the parent task's Company.
12. Introduce functionality to allow "Notification" variables to be used in Entry Type instructions text.

Tasks >>> Send an Email utility screen

1. Revise instructions text.
2. Revise spacing so as to better manage page real estate.

Tasks >>> Change Log utility screen

1. Introduce the following new Change Log elements …
    a. Incoming Ad Hoc email response received.
    b. Incoming Ad Hoc email response reviewed.
    c. Incoming Notification email response received.
    d. Incoming Notification email response reviewed.
    e. Response Comment Added.
2. Revise the Change Log images for the following Change Log elements …
    a. Outgoing Ad Hoc email
    b. Outgoing Notification email
    c. Comment reviewed
    d. Automated Comment Review on task close
    e. All open Comments closed by an Administrator
3. Change Log instructions …
    a. Revise Change Log instructions so as to accommodate for the introduction of "Responses".
    b. Revise "Automated Reminder Close on Task closure" Change Log instruction segment.
    c. Revise "Automated Comment Review on Task closure" Change Log instruction segment.
    d. Introduce a "Response Comment Added" Change Log instruction segment.
4. Revise the conditions under which the "Automated Reminder Close on Task closure" Change Log insertion is made.
5. Revise the conditions under which the "Automated Comment Review on Task closure" Change Log insertion is made.
6. Revise the text associated with the "Automated Comment Review" and "Automated Reminder Review" Change Log insertions.

Tasks >>> Reassign utility screen

1. Implement the "Activate Optional Features" screen's "Disable Reason on Task Watch Reassign" option such that, when selected, the "Reason" field on the "Reassign" utility screen is hidden when viewed via the "Task Watch" option.

Tasks >>> Summary Object

1. Add a "Point of Presence" data element to the "Overview" section of the Summary Object which is to be displayed if it has been enabled via the "Summary Object Options" screen.
2. Add a "Swimlane" data element to the "Overview" section of the Summary Object which is to be displayed if it has been enabled via the "Summary Object Options" screen.

3. Display a Flag icon on the Summary Object if the task under question has been Flagged and the "Activate Optional Features" screen's "Display Flag icon when Flag active" sub option, found under the "Enable the use of Flagging" option, has been selected.
4. Wire in the "Redact Primary Company People" sub option found under the "Summary Object Options" screen's "People displayed" option such that Primary Company users are redacted where non-Primary Company users are viewing the Summary Object.
5. Implement the ability to disable the following Utilities at the Thread Type level as per the options selected via the Therefore ThreadBuilder's Thread Type level "Utilities" tab …
    a. Base Data
    b. Change Log
    c. Comment adding
    d. Email sending
    e. Flagging
    f. Notes
    g. Reassigning
    h. Reclassifying
    i. Reminder setting
    j. SMS sending

Tasks >>> Task / Query Review screen

1. Enable the display of "Notifications" on the Task / Query Review screen.
2. Make various heading styling revisions to improve ease of use.
3. Revise the inline styling that is applied to Entry headers to improve ease of use.
4. Add an optional "Point of Presence" field under the "Overview" section's "General" sub heading.
5. Add an optional "Additional Reference" field under the "Document Details" section's "General" sub heading.
6. Add an optional "Document Date" field under the "Document Details" section's "General" sub heading.
7. Add an optional "Point of Presence" field under the "Sub Activity" section's "Overview" heading.
8. Add an optional "Document Value" field under the "Sub Activity" section's "Founding Document" heading.
9. Add an optional "Additional Reference" field under the "Sub Activity" section's "Founding Document" heading.
10. Add an optional "Document Date" field under the "Sub Activity" section's "Founding Document" heading.
11. Review the sequence in which utility content is displayed on the Task / Query Review so as to improve ease of use / mirror the sequence in which buttons are displayed on the Task Summary Object.
12. Integrate "Terminator Descriptions" into the Task / Query Review screen at the following points …
    a. Task Status
    b. Parent Task "Sub Activity" listing
    c. Parent Task "Sub Activities" section "Reference"
13. Wire in the "Redact Primary Company People" option found on the "Review and Utility Screen Option" screen (under the "Overview Configuration" section's "People" sub heading) such that Primary Company users are redacted where non-Primary Company users are viewing the Task / Query Review.

Comments >>> Review Comments utility screen / Comments tab

1. Revise the placement of the "Creation date" data element.
2. Revise screen logic such that additional "Created by" user data is not displayed if the signed in User is the same as the "Created By" User.
3. Perform a "Welcome" text review / make it contextually dynamic.
4. Revise the "Review Comments" utility screen's instruction text.

5. Revise the rules that manage the display of the Comments tab and its underlying options so as to enhance ease of use.
   a. Accommodate the new "Hide Comments tab if no options have content" configurative option that has been added to the "Activate Optional Features" screen.
   b. Accommodate the new "Hide Comments tab options without content" configurative option that has been added to the "Activate Optional Features" screen.
6. Disable the "Review" button if no Comments have been selected for review.
7. Implement an optional "Response" capability at the point in time that a Comment is reviewed and allow for the optional inclusion of attachments, using either the standard uploader or an advanced / jQuery uploader.

Reminders >>> Close Reminders utility screen / Reminders tab

1. Revise the placement of the "Creation date" and "Due date" data elements.
2. Perform a "Welcome" text review / make it contextually dynamic.
3. Revise the rules that result in the display of the Reminders tab so as to enhance ease of system use.
   a. Accommodate the new "Hide Reminders tab if no options have content" configurative option that has been added to the "Activate Optional Features" screen.
   b. Accommodate the new "Hide Reminders tab options without content" configurative option that has been added to the "Activate Optional Features" screen.
4. Disable the "Close" button if no Reminders have been selected for closure.

Responses >>> Review Responses utility screen

1. Introduce a Responses tab that allows for ease of working with Responses.
2. Introduce a Review Response utility screen, accessible via the Responses tab, to allow for the review of Responses that have been made to "Ad hoc" and "Notification" emails on which Responses have been enabled.

Site Setup >>> Base Configuration screen

1. Rename the "Primary Company" screen such that its new name is "Base Configuration", which is more descriptively accurate.
2. Revise the headings carried by the page so as to improve ease of use.
3. Make various narration refinements.
4. Revise instructions text.
5. Add a "Primary Point of Presence" dropdown in support of the integration of "Points of Presence" into tasks / queries.
6. Add the following new options to provide additional configurative alternatives to drive the default allocation of tasks / queries to Companies and Points of Presence …
   a. Tasks default allocated to Primary Company
   b. Tasks default allocated to Primary Point of Presence

Site Setup >>> Management Visibility Defaults screen

1. Remove superfluous headings so as to improve use of real estate and improve ease of use of the screen.
2. Revise instructions text and associated images.

Site Setup >>> Password and Sign In Configuration screen

1. Introduce the ability to enable optional Two Factor Authentication (2FA).
2. Introduce a "Sign In Screen Cookie Notice" option.
3. Revise instructions text.
4. Introduce headings to improve ease of use.
5. Rename the "Password Rules" such that it is now called the "Password and Sign In Configuration" screen.

Site Setup >>> Activate Optional Features screen

1. Revise instructions text.
2. Revise headings to improve the ease of use of the screen.
3. Ensure that the "Present User with option" radio option is default selected if the "Enable sign in availability review for Out of Office Users" parent option is selected.
4. Introduce configurative options in support of an "Additional Reference" duplicate checker.
5. Introduce an "Enable Response when Reviewing" sub option under the "Enable the use of Comments" option. Further, introduce the following child options that are to be visible if the "Enable Response when Reviewing" sub option has been selected …
   a. Enable attachments
   b. Use advanced / jQuery file uploader
6. Introduce a "Display Flag icon when Flag active" sub option under the "Enable the use of Flagging" option.
7. Introduce an "Allow Users to self-manage" option under the "Managers, POP and Department Heads Configuration" heading.
8. Add configurative options for the "Comments" tab such that …
   a. If the "Hide Comments tab if no options have content" option has been selected, the Comments tab is not to be displayed if there are no items listed under the underlying options.
   b. If the "Hide Comments tab options without content" option has been selected, options without content are not to be displayed.
   c. The "Hide Comments tab options without content" is to be a child of the "Hide Comments tab if no options have content" option.
9. Add configurative options for the "Reminders" tab such that …
   a. If the "Hide Reminders tab if no options have content" option has been selected, the Reminders tab is not to be displayed if there are no items listed under the underlying options.
   b. If the "Hide Reminders tab options without content" option has been selected, options without content are not to be displayed.
   c. The "Hide Reminders tab options without content" is to be a child of the "Hide Reminders tab if no options have content" option.
10. Add configurative options for the "Responses" tab such that …
    a. If the "Hide Responses tab if no options have content" option has been selected, the Responses tab is not to be displayed if there are no items listed under the underlying options.
    b. If the "Hide Responses tab options without content" option has been selected, options without content are not to be displayed.
    c. The "Hide Responses tab options without content" is to be a child of the "Hide Responses tab if no options have content" option.
11. Add configurative options for the "Tasks" tab such that …
    a. If the "Hide Tasks tab if no options have content" option has been selected, the Tasks tab is not to be displayed if there are no items listed under the underlying options.

      b. If the "Hide Tasks tab options without content" option has been selected, options without content are not to be displayed.

      c. The "Hide Tasks tab options without content" is to be a child of the "Hide Tasks tab if no options have content" option.

12. Revise the placement of the "Display User Company on *Add a Comment* screen" option.
13. Add a "Display Flag icon when Flag active" option and ensure that the Flag icon is displayed / not displayed on the Summary Object accordingly.
14. Introduce a "Disable Reason on Task Watch Reassign" option.
15. Add a "Use advanced / Spreadsheet viewer object" option which will enable the use of a Spreadsheet data viewer object on the "Report Viewer" if selected and implement accordingly.

Site Setup >>> Communication Types screen

1. Add an "Enable read confirmation" option which, if selected, activates the "Responses" tab / functionality.
2. Add a "Disable daily / scheduled Types on weekends / public holidays" option which, if selected, prevents the "To Do List", "Dashboard" and "Scheduled Reports" email types from being output on weekends and public holidays.
3. Add an "Enable Report Emails / Functionality" option which, if selected, activates the "Scheduled Reporting" functionality.
4. Add an "Update Report Log" option which, if selected, will see the Report Log being updated when Scheduled Reports are run.
5. Add a "Point of Presence" option to the "Task / Query Detail Object Options" section.
6. Revise headings to improve ease of use.
7. Revise instructions text.

Site Setup >>> Summary Object Options screen

1. Add a "Point of Presence displayed" option.
2. Add a "Swimlane displayed" option.
3. Add a "Redact Primary Company People" sub option to the "People" section's "People displayed" option.
4. Revise instructions text.

Site Setup >>> Review and Utility Screen Options screen

1. Add a "Limit Responses displayed by menu option selected" option under the "Tab Utility Screen Options" heading to accommodate for the introduction of "Responses" functionality.
2. Add a "Display Document Value" option to the Sub Activity's "Founding Document" section.
3. Add a "Display Additional Reference" option to the Sub Activity's "Founding Document" section.
4. Add a "Display Document Date" option to the Sub Activity's "Founding Document" section.
5. Add a "Point of Presence displayed" option to the Sub Activity's "Overview" section.
6. Add a "Point of Presence displayed" option to the "Overview Configuration" section under the "General" sub heading.
7. Add a "Redact Primary Company People" option to the "Overview Configuration" section under the "People" sub heading.
8. Make various heading revisions to improve ease of use.
9. Revise instructions text.
10. Introduce a configurative option to enable the use of an advanced / jQuery file uploader on the Create and Update screens.

11. Implement the Therefore ThreadBuilder "Details" tab "Priority" field "Not editable" option such that the "Priority" field is hard set to default and is rendered "Not editable" on task creation where selected.
12. Add a "Prefix Entry Heading with Swimlane" option and ensure that, where the option has been selected and a Swimlane has been allocated to the Entry Type under question, the system prefixes the Entry Heading with the Swimlane name.

Site Setup >>> System Admin Scripts screen

1. Add new System Admin Scripts …
    a. Clear Client records
    b. Clear Script Log
2. Make various revisions to Script Log insertions.
3. Revise instruction text.

Site Setup >>> Reassign Reasons screen

1. Resolve a bug that occurs under certain conditions when the "please select" option is selected via the "Select a Reassign Reason to edit" dropdown.
2. Revise "Select" heading.

Site Setup >>> Swimlanes screen

1. Introduce a "Swimlanes" screen to allow for the management of Swimlanes.

Security and User Groups >>> Security Groups screen

1. Add a "Point of Presence" option to allow for Points of Presence to be allocated to Security Groups in support of the ThreadBuilder's Point of Presence "Limit by Security Group" option as configured on the ThreadBuilder's "Company / POP" tab.
2. Add the following sub options to the "Enable Performance option" option to allow for the material detailed under the "Dashboard" tab's "Performance" option to be fine-tuned.
    a. Exclude "Open Tasks that I need to Process / Manage"
    b. Exclude "My Department's Open Tasks by Classification"
    c. Exclude "My Department's Open Tasks by User"
    d. Exclude "Open Portal / My Company's Open Tasks by Task Type"
3. Revise instructions text.
4. Resolve a bug that occurs under certain conditions when the "please select" option is selected via the "Select a Security Group to edit" dropdown.

Security and User Groups >>> User Groups screen

1. Resolve a bug that occurs under certain conditions when the "please select" option is selected via the "Select a User Group to edit" dropdown.

Personal Administration >>> My Password screen

1. Introduce the ability to enable / disable Two Factor Authentication, should it have been activated on the "Password Rules" screen.
2. Introduce headings to improve ease of use.
3. Revise instructions text.

Personal Administration >>> My Management Visibility screen

1. Remove superfluous headings so as to better use screen real estate and to improve ease of use of the screen.

Personal Administration >>> My Email Address screen

1. If the user's "Email Address" field is potentially visible via system emails, given Site Setup "Communication Types" config, mark the "Email address" narration with an icon that indicates that the email address may be carried by emails output by the system.
2. Revise instructions text.

Personal Administration >>> My Contact Details screen

1. If the user's contact numbers are potentially visible via system emails, given Site Setup "Communication Types" config, mark the applicable contact number narrations with an icon that indicates that they may be carried by emails output by the system.
2. Revise instructions text.

User Administration >>> User Management screen

1. Introduce the ability to deactivate Two Factor Authentication should it have been activated on the Site Setup section's "Password Rules" screen and subsequently activated by the user via the "My Password" screen.
2. Should the "Activate Optional Features" screen's "Allow Users to self-manage" option, found under the "Managers, POP and Department Heads Configuration" heading, have been selected, allow the active user's name to be selected as a First and / or Second Line Manager.
3. Ensure that the "Refresh Password" button is disabled if a password has not yet been set.

User Administration >>> Management Visibility screen

1. Remove superfluous headings so as to better use screen real estate and to improve ease of use of the screen.

Report Administration >>> Report Scheduling screen

1. Introduce a "Report Scheduling" screen to allow for the introduction of automated daily report dissemination via email.

Report Administration >>> Manage Reports screen

1. Resolve a bug that occurs under certain conditions if the "please select" option is selected via the "Select a Report to edit" dropdown.

Thread Type >>> Base Elements / Thread Type Allocation screen

1. Add a "Point of Presence" option to allow for the allocation of Tasks / Queries to Points of Presence.
2. Revise Instructions text.

Search >>> Smart Search

1. Add an "at" Keyword that allows for one to search for a task / query on the basis of its Point of Presence.
2. Add a "docdate" Keyword that allows for one to search for a task / query on the basis of the date associated with its Founding Document.
3. Add a "swim" Keyword that allows for one to search for a task / query on the basis of its current Swimlane allocation.
4. Revise the "doc" Keyword such that it now also searches the "Additional Reference" field.
5. Revise Smart Search Welcome Text / instructions.

Help >>> Site Credits

1. Revise site credits.

Help >>> Release & System Usage Information

1. Correct a "Database version" error that occurs if the scripts are run out of sequence.

Company, Point of Presence & Client >>> Point of Presence screen

1. Introduce new "Confirm Actions" that trigger if …
    a. One disables the "Primary Point of Presence".
    b. One disables a Point of Presence that has been allocated to one or more Thread Type via the "Base Elements / Thread Type Allocation" screen.
    c. One disables a Point of Presence that has been allocated to one or more Security Groups via the "Security Groups" screen.
2. Revise "User Groups" Confirm Action text.

Footer

1. Correct an error with the Footer's "Active Task" component that results in the task number not being displayed if the active task is not displayed in the "Task Summary" panel.

Therefore ThreadBuilder™

1. Add "Product Name" to the title bar.
2. Various tab key sequence revisions made.
3. Various Tab name and sequence changes made.
4. Various narration refinements made.
5. Ensure that all description / narration capture fields have leading, trailing and extra spaces removed on save.
6. Add the following "Additional Reference" config fields to the "Founding Doc." tab to enable the use of an "Additional Reference" when working with tasks / queries …
    a. "Display Additional Reference" option
    b. "Additional Reference" narration
    c. "Additional Reference mandatory" option
7. Add the following "Document Date" config fields to the "Founding Doc." tab to enable the use of a "Document Date" when working with tasks / queries …
    a. "Display Document Date" option

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b. "Document Date" narration
c. "Document Date mandatory" option
8. Add the following "Point of Presence" config fields to the "Company / POP" tab to enable the use of "Points of Presence" when working with tasks / queries …
   a. "Point of Presence Description" narration
   b. "POP required on Create / Update & Base Data" option
   c. "Limit by Security Group" option
9. Add a "Set as per parent Task" option to the "Company / POP" tab to enable child tasks to be automatically linked to the parent task's Company.
10. Revise the placement of options on the "Company / POP" tab so as to improve ease of use.
11. Revise the placement of options on the Entry level "Reassign" tab so as to improve ease of use / clearly indicate parent / child relationships.
12. Revise the default setting for the Company "Limit by Security Group" found on the "Company / POP" tab.
13. Add the following options to the Entry level "Buttons" tab …
    a. Primary Company Only
    b. Non-Primary Company only
    c. Redact
    d. Attachments Optional
14. Add a "Terminator Description" field to the Entry Level's "Buttons" tab to allow for a termination description to be captured in the case of "Terminator" buttons.
15. Resolve a "Button" listing sorting error that occurs should you wish to sort the "Button" listing by clicking the "Button" or "Order" columns.
16. Disable / clear all controls on the Starting Entry Type's "Sub Activities" tab on save.
17. Revise formatting on the "Notice" tab to render it consistent with all other tabs.
18. Revise the placement of fields / options on the Entry Level "Details" tab.
19. Resolve an error that occurs should one click the "Entry Type Name" column header on the Entry Type's "Email Cycle" tab.
20. Make the data table on the Entry Level's "Sub Activities" tab sortable when clicking the "Thread Type" column.
21. Introduce config options on the Entry level "Details" tab such that the following fields can be redacted should the user not be a Primary Company user …
    a. Short Description
    b. Long Description
    c. Short Text
    d. Priority
    e. Date / time
22. Move the Entry level's "Details" tab attachment material to an "Attachments" tab.
23. Introduce config options on the Entry level "Attachments" tab such that individual attachments can be selected for redaction should the user not be a Primary Company user.
24. Introduce, on the Entry level "Details" tab, the following new "Date / Time" options …
    a. Date Only
    b. Allow Past Dates
25. Introduce a new "Numeric Only" configurative option for the "Short Text" field found on the Entry Type level's "Details" tab.
26. Introduce a new "Not editable" configurative option for the "Priority" field found on the Entry Type level's "Details" tab.
27. Introduce a new "Auto select Initiator if listed" configurative option on the "Owner" tab.

28. Introduce a "Utilities" tab at the Thread Type level that allows for the following utilities to be disabled at the Thread Type level …
    a. Base Data
    b. Change Log
    c. Comment adding
    d. Email sending
    e. Flagging
    f. Notes
    g. Reassigning
    h. Reclassifying
    i. Reminder setting
    j. SMS sending
29. Indicate "Sub Activity only" Thread Types on the Thread Type / Entry Type navigation interface by applying a "link" overlay to the Thread Type icon.
30. Allow for a "Swimlane" to be selected at the Entry Type level via the "Details" tab and ensure that, where a Swimlane has been selected, the Thread Navigator prefixes the Entry Type name with the relevant Swimlane abbreviation.
31. Add a "Hide" option for the "Proxy" tab's "Name" field and ensure that the Task Create / Update screens accommodate the new configurative option.

Service

1. Undertake development to enable the service to periodically poll an email address with a view to Identifying email Responses to "Ad hoc" or "Notification" emails for which Responses have been enabled and process them by …
    a. Drawing them into the web system database / file system and
    b. Sending an email advising the appropriate user that there has been a response or
    c. Sending an email advising the appropriate user that there has been a response that needs to be reviewed or
    d. Advising the responder that the task / query under question has been closed and can therefore not be responded to.
2. Ensure that the service's email Response checker is only activated if the "Enable recipient reply" option on the "Communication Types" screen has been selected.
3. Introduce Service functionality that allows for automated daily email report distribution as configured via the "Report Scheduling" screen.

Notifications

1. Introduce the ability to retain record of Notification emails sent and display them on the Task / Query Review.
2. Introduce additional variables which define whether or not a Notification can be responded to …
    a. Reply on (@replyNoteOn)
    b. Reply off (@replyNoteOff)
3. Introduce various additional variables …
    a. Document value (@docValue)
    b. Document date (@docDate)
    c. Task creator initials (@CreateInitials)

  d. From initials (@fromInitials)
  e. To initials (@toInitials)
  f. Task creation month (@CreateMonth)
  g. Task creation year (@CreateYear)

4. Resolve various errors that occur when an "@exRef …" address variable is used and an email address has not been captured to the applicable External Reference field.

Email Templates

1. Revise the "Response allowed / Response not allowed" message on the "Communication" template.
2. Add a "Responses for My Review" line to the "To Do List" template.
3. Introduce a "Response Created" email template.
4. Introduce a "Response not permitted on closed task" email to be sent to the responder should he / she respond to an Ad Hoc Email / Notification connected to a task that was subsequently closed.
5. Resolve an error with the Proxy closed email which resulted in it incorrectly carrying all attachments as opposed to only the attachments that relate to the last Entry.
6. Resolve an error with the Proxy created email that resulted in Entry level detail not being carried by the Task Review PDF.
7. Increment the Copyright year to 2023.
8. Introduce a Scheduled Report email template (ScheduledReport.xml) as required for new "Report Scheduling" functionality.

Security Management

1. Address various "path revealed" risk points.
2. Implement Optional Two Factor Authentication (2FA).

Database Management

1. Implement various database scripts to accommodate for new functionality / database design refinements (Scripts 145 to 165).
2. Add various additional foreign key constraints to tables to improve data consistency.
3. Perform various script tidy-ups.

Redis management

1. Upgrade the version of Redis to latest stable version.

Rich Text Editor management

1. Upgrade the version of TinyMCE to latest stable version.
2. Implement Print functionality.

Options Menu

1. Introduce a new menu heading – "Report Administration".
2. Move the "Manage Reports" menu item to under the "Report Administration" menu. heading.
3. Introduce the following new menu items …

       a. "Report Scheduling" under the "Report Administration" menu heading.
       b. "Swimlanes" under the "Site Setup" menu heading.
4. Various menu heading / menu item sequence changes made.

Reports ➜ Report Viewer

1. Rewrite the "Report Viewer" using the latest versions of Angular components.
2. Allow for an optional spreadsheet data viewer object.
3. Allow for a spreadsheet format download.

Reports ➜ Report Tab

1. Revise welcome / instruction text to accommodate for the rewrite of Report Viewer.

Miscellaneous

1. Change the format that is used throughout the system when date / time is presented to improve ease of readability.

.NET Framework management

1. Upgrade the .NET Framework to .NET 4.8.
2. Implement a new Rest API using .Net 6.

Images management

1. Remove various site images that are no longer required.

Stylesheet management

1. Make various refinements to the **Light Blue / Authenticated** style sheet to improve look and feel / ease of use and to accommodate new functionality.
2. Make various refinements to the **Public / Unauthenticated** style sheet to improve look and feel / ease of use and to accommodate new functionality.
3. Introduce an Attachments style sheet to allow for the presentation of response emails should one click the link.

Resource file management

1. Tidy-up various resource file elements.
2. Rename various resource file elements.
3. Delete various resource file elements that are no longer required.

Copyright management

1. Update Email Templates such that they indicate © 2023.
2. Update the Therefore ThreadBuilder™ application such that it indicates © 2023.
3. Update the Report Viewer such that it indicates © 2023.
4. Update the Web application such that it indicates © 2023.

5. Update Stylesheets to indicate © 2023.

Version management

1. Update Web version number to 7.x.x.x.
2. Update Therefore ThreadBuilder™ version number to 7.x.x.x.
3. Update Service version number to 7.x.x.x.

[End]