INDEX

Gold Master Version 1.5.1- November 2017..... 1.4.1 - Cases Auto Assign Using System Code..... 1.4.2 - CAST Auto Assign Using System Code..... 1.4.3 - Configure Assign to Option for External User by Case Type..... 1.4.4 - Cases Email Notification For External User.....

1.4 - Gold Master Version 1.5.1 - November 2017 Gold Master version 1.5.1 release includes some added new features and few bug fixes.

Gold Master version 1.5.1 release includes some added new features and few bug fixes on Single Domain, Cases, Entities, and Cast application

Following are new features included in GM 1.5.1:

Cases Auto Assign using System Code
 Cast Auto Assign using System Code
 Configure assign to option for External User by Case Type
 Cases Email notifications for External Users

Following are bug fixes included in GM 1.5.1:

### Cases

Email to CC (unable to add multiple users to send emails)
 Single Domain related issues (Permission window doesn't open on Case Type)
 Issue when multiple calculation field sending from one parent field. Only one of the calculation field will auto calculate when parent field is selected, the rest requires the user to manually click the calculate button
 Special characters (For example: \* ") affects sync to Facts.

Entities

Single Domain related issues (Multi Select in Extensible grid was not functioning, Delete from New Tab, Cases & Quest relationship grid)
 Temphate related issues (Data not displayed on Cases Relationship Grid, Export to PDF doesn't function when default template is applied on Entity List/View Page)
 Entity Origination center missing mobile cards for responsive view
 Able to delete Parent Entity when they are cascaded. For example if Country (Parent) is cascaded to State (Child), able to delete Country that is cascaded to child.

## Quest

Single Domain related issues (PDF Export, Unable to add new user's in Permission Window, Unable to upload images)

Standards

Single Domain related issues (Attach file issue on admin page, Book not displayed on Home page)

### Departments

Single Domain related issues (Unable to edit and delete Entity Type and Entity Role)

Cast

Calculation issues (Calculation doesn't work for Expandable text field, calculated due date is not displayed in Case title)
 Date format issues in Spanish and English format
 Implemented functionality for Single Domain

ORG Chart

Implemented functionality for Single Domain
Read connection string from Registry

### 1.4.1 - Cases Auto Assign Using System Code

This functionality in cases application allows the user to auto-assign using 'AASGN' system code.

### Steps to configure

Create the System Code: "AASGN" from the System Code table of Cases Configuration Application. If the System code is already created then please do not another System Code.
 Bic Unique System Kode: Enter "AASGN"
 Field Level: Select ASSO. TYPE
 System Code: Enter "AASGN"
 Name: Enter Orean Assignee
 Description: Enter Description

STEMMONS CENTRAL	ociate System Code				Cises Entities Departmen	ts FACTS Quest S System   Te
ses	Add New					
stem Configuration - Table						Search:
tem Configuration - Security						
SES - Associate System Code	ID 20	IE Field Level	System Code	Lî Name	11 Description	Lî Edit
ES - Case Activity Types	26	ASSOC_TIPE	11112	Case Title	This is a standard Type Column	
s - Case Assoc Screen Item	30	ASSOC_DECODE	REICT	Reject Status		6
- Asoc Type Cascade	31	ASSOC_DECODE	APPRO	Approved Status		G
- Due Alert	32	ASSOC_TYPE	BLDG	Bilding	*	G
Entity Role Base Assignment	33	ASSOC_TYPE	CMPNY	Company		G
5 - Note Type	36	ASSOC_TYPE	EMLID	Email Address	Email Address	G
- Case Override security config	37	ASSOC_TYPE	PHONE	Phone Number	Phone Number	G
- Case Screen Item	38	ASSOC_DECODE	PO	Priority 0 Type		G
- Case Types	30	ASSOC TYPE	CMPUS	Campus	Campus	R
- Case Type Email Commands		Access proppr	2000	200 0		ő
- Alert Exclusion	44	ASSOC_DECODE	300PR	300 Review	300 Review associated case type. PP CSP PWO	6
EMAIL ALERT TEMPLATE	45	ASSOC_TYPE	PRNTC	Parent Case Code	This this for parent field code	G
- Config System	46	ASSOC_TYPE	SCOUN	Stem_Country		G
- Email Template	47	ASSOC_TYPE	SSTAT	Stem_State		G
- External Datasource	48	ASSOC_TYPE	SCITY	Stem_City		G
- External User Assign To Option	49	ASSOC_TYPE	SLOCA	Stem_Location		G
5 - Omit Alert	50	ASSOC TYPE	SCOPE	Scope	This is for kanban view	ß
tments	52	ASSOC TYPE	AACON	Default Assistant	Default Assistant for automation	e e
s	52	ASSOC_TIPE	NICCHA	Default Assignee	Deraus Assignee for autoassign	6

2.

Navigate to Fields Type edit screen of Case Types. Associate System Code for to the Field of Case Type in the configuration application for cases using the System Code column. The "AASGN" System Code works for the following Field Types: Lookup Control External Datasource Calculation Field Text Field Doppdown Field

CASES - Case Types	Case Defaul Assign
--------------------	--------------------

unun														
elds														
												Sea	rch:	
ID JL	Field Type	Name 👔	Description 11	System Code	Order 👔	Case Type ID ⊥†	External Datasource	Show in List ⊥î	Width 🔐	Active 11	Required 11	Security 11	Separator Character 11	LIST DESKT PRIORI VALUE
153	Text Field	Case Title Name	name of Case Summary	(TITLE) Case Title	1	19		Y		Y	N	View		1
154	External Data Source	country	Country		2	19	Country	Y		Y	N	View		2
155	Lookup control	Employee	Employee	[AASGN] Default Assignee	3	19	AIL_User	Y		Y	N	View		3
156	Calculation Field	Calculated field	Calculated field		4	19		Y		Y	N	View		4
157	Text Field	Text Field	Text Field		5	19		Y		Y	N	View		5
158	Drop Down Field	NewDRP	NewDRP		6	19		Y		Y	N	View		6

1.4.2 - CAST Auto Assign Using System Code This feature is related to the Cases Auto Assign Using System Code. When user selects "Case Default" option in the Assign To screen of CAST, Cases generated will be assigned to the employee listed in the field associated to the Assignee System Code (AASGN).

STEMMON: Central Autor	S CENTRAL mation System ≫ Edit Job			Assign Items To	x
	Choose Base Field	- · ·		Choose a Single Person     Choose Multiple Person	This option will create a case and arrian to each
	Choose base Field (	i) None v		selected user.)	This option will cleate a case and assign to each
	* Schedule			Choose People based on Role A	Assignments
		Send One Time Only		Choose People based on Depart	tment Hierarchy
		Job Runs At: 10/30/2017		All Employees	
	* Job Name	Test34		Hoppers     Gree Default	
				Case Delaur	
	Case little Name (				Save
		11203			
	country (	None selected V			
	Employee (	D 1 selected ~	Employee		
	Calculated field	Kenneth Freeman	Calculation purpose		
	Text Field	Kermit Joseph			
	(	E Ketul Patel			
		Kevin Patterson     Kevin Tatum			
	NewDRP (	D Kevonte Calhoun	1		
	Add New Notes	Keyur Patel			
		<ul> <li>Khanh Trinh Nguyen</li> </ul>			
	. Styles - Format - Fo	Kim Moore			
		Kimberli Adame	•		
	I		I.		
				Cacaro P	
Job Preview					
Preview for F	orce Start OPrev	iew for Next Run			
Preview of JobT	est34(Edit)				
Total 1 case(s) will	l be generated.				
Schedule Descriptio	on: Send One Time Only; Job Runs At: 10/3	0/2017			
Details about cases 1	to be generated:				
Case to be generat	ted for Khanh Trinh Nguyen				
1					
1					
1					
1					
1					
1					
1.4.3 - Configure Assign to The Assign to Option for E	Option for External User by Case Type External User is now configurable by Case T	ype.			

How It Works:

A Case Type column has been added to the External User AssignTo Option table in Cases Config. User can set the Assign to Options and select the specific Case type to apply the options to.

# \* \* \* \* \* \*

Cases	<b>_</b>	Add New						
System Configuration - Table	11					s	earch:	
System Configuration - Security CASES - Associate System Code	L.	ID IA	INTERNAL_USER_WITH_OPTION	EXTERNAL USER_WITH_OPTION	IS_ACTIVE	CASE TYPE	11	Edit
CASES - Case Activity Types	11	1	All Users from Activity Log	Users in Company	Y	Testing Case Type	Т	G
Cases - Case Assoc Screen Item	11	4	All Users from Activity Log	All Users from Activity Log	Y	Deep case Type		G
Cases - Asoc Type Cascade	11	5	All Internal Users	All External Users	N	Approval Test Case Type		G
Cases - Due Alert	s	Showing 1 to 3 of 3 entries						
Cases-Entity Role Base Assignment								
CACED Name Tunn								

STEMMONS CENTRAL

	😼 Assign Case - Mozilla Firefox —		×	
ve Refresh Attach A in File Te	Cases-pgmt-15.boxerproperty.com/EmployeeSearch.aspx?CaseID=48428	kAssignl	Nov	
	Search Employee By Name			
Name: *	Search			
Status: *		_		
Date:	abc xyz (Test Company-123@123.com) 28 17 (Test Company-28@17.85) Mitali Patel (Test Company-abc@xyz.com)	Í		
Country:	ABC Nguyen (Test Company- abc12@xyz.com) kevin tester (Test Company- amit@testingnew.com) Deep Patel (Test Company- deep@test.com)			
State:	Test User (Test Company- Khanh.Nguyen@Boxerproperty.com ) Khanh Nguyen (Stemmons Consultant)			
City:			_	
Location:	Select Employee   Cancel			
About:				
Add Email CC -				

1.4.4 - Cases Email Notification For External User

This feature allows external users to receive email notifications for Cases. The email notification is configurable by Case type and Alert type. The body of the email notification can also be configured to include metadata tags of the Case.

### Steps to Configure:

Set up the Email Alert Template

Navigate to the Case Email Alert Template table in Cases config.

The following are the fields that is in the table:

CASE\_EMAIL\_ALERT\_TEMPLATE\_NAME: Enter a name for the alert template (anything that would help you identity the alert template and what it is used for)
 TEMPLATE\_BODY: This field allows the user to configure the body of the email using html and metadata tags.
 IS\_ACTIVE: Check the bas to make the alert template active

Image: Set in Configuration, Set in Configuratin Configuration, Set in Configuration, Set in Configur	STEMMONS CENTRAL	8		Cass Livites Departments	iACTS System Test	Associate the Email Alert Template to a Case Type
Automation     Automation <td>Cases System Configuration - Table Surger Configuration - Security</td> <td>Add New</td> <td></td> <td></td> <td>Search:</td> <td>Navigate to the – Cases – Email – Template table in</td>	Cases System Configuration - Table Surger Configuration - Security	Add New			Search:	Navigate to the – Cases – Email – Template table in
Odd: - Care steiny Type       Mail care bady in a manufale difference of the stein of the stein gland difference of the stein of	CASES - Associate System Code	CASES_EMAIL_ALERT_TEMPLATE_NAME	17 TEMPLATE_BODY 11	IS_ACTIVE	11 Edit	Cases config.
Data         Construction         Part can be are any property framework interpret fr	CASE - Care Activity Types Care - Care Type Caresh Care Care - Ance Type Caresh Care Care - Dav Aren Care - Care Care Care Care Care - Care Care Care	Can tya 1 upan	Mails rais for prove execution of this base galaxie (Caralumian) Executive Caralumian Executive Caralumian Executive Caralumian Executive Caralumian Executive Caralumian Executive Execut	Y	œ	<ul> <li>The following are the fields that is in the table:</li> <li>CASES_TYPE_ID: Select the Case type to apply the Em ail A lert Template</li> <li>TEMPLATE_NAME: Enter any name for the Template</li> <li>TEMPLATE_USE:</li> </ul>
Control Nampine         Not care Program exclude dish has beer dood. (care/under)         down           CABLE - Inner Version         Beer Version-Version         C CEE To Environ         C CEE To Environ           CABLE - Inner Version         Beer Version-Version         C CEE To Environ         C CEE To Environ           Came - Inner Version         Beer Version-Version         C CEE To Environ         C CEE To Environ           Came - Inner Version         Beer Version-Version         C CEE To Environ         C CEE To Environ           CUBS - Inner Version         Beer Version-Version         C CEE To Environ         C CEE To Environ           CUBS - Inner Version         Beer Version-Version         C CEE To Environ         C CEE To Environ           Cuber Version         Beer Version-Version         C CEE To Environ         C CEE To Environ         C CEE To Environ           Cuber Version         Constant         Beer Version-Version         C CEE To Environ         <	CASES - Config System	Case type 1 created	Helic, a case has been assigned to you. [CaseNumber] Esterna/NewCaseURU (Esterna/NewCasePoralURU) (Esterna/CaseVoral Diversional CaseVoral Diversional CaseVoral Diversional CaseVoral Diversional Diversionad Diversional Diversionad Div	Y	G	Select the Alert type from the drop
Cuerter Care (Care (get Cloud) Care (get Cloud) (Deduxed)) Y G Y when a Case	Cases - Email Tanglates CASES - Element Disasources Cases - Element Unit Anglins Option CASES - Onich Alex Departments Entotios Queet	Con type 1 Cound	Mole care therpic we accorded the best cloud. Carellumber           Borner/Vic-Accord, UKU           Control, UKU           Control, UKU           Dispatch ()           Logistich ()	Y	ŭ	<ul> <li>down</li> <li>CREATE:User will receive an email when they create a Case</li> <li>UPDATE: User will receive an email</li> <li>when a Case</li> </ul>

CLOSE: User will receive an email when a Case associated to them is closed.
 IS\_ACTIVE: Check the box to make the email template active
 CASES\_EMAIL\_ALERT\_TEMPLATE\_ID: Select the Email Alert Template

STEMMONS CENTRAL	Cases - Email Template   Testing Case Type				×	Email Sample
	Edit					1
Cases	CASE TYPE ID :	Testing Case Type	*TEMPLATE_NAME :	Template 2		
System Configuration - Table						
System Configuration - Security	TEMPLATE, USE :	UPDATE	IS, ACTIVE :	$\checkmark$		
CASES - Associate System Code						
CASES - Case Activity Types	CASES DAAL ALERT TEMPLATE ID :	Case type 1 update				
Cases - Case Assoc Screen Item						
Cases - Asoc Type Cascade					SAVE	
Cases - Due Alert						
Cases-Entity Role Base Assignment						
CASES - Note Type						

Hello, a case that you are associated with has been updated

 $URL: http://cases-pgmt-15.boxerproperty.com/ViewCase.aspx?CaseTypeID{=}3\&ListID{=}68$ 

Name: Testing Created by: Test User Created on: 10/12/2017 Assigned to: Test User Assigned on: 10/12/2017 7:00:01 PM Updated by: Khanh Nguyen Updated on: 10/26/2017 7:05:458 AM Owned by: Test User Owned by: Test User Owned by: Test User Notes by: Khanh Nguyen on 10/26/2017 10:38:28 AM Update to Case Update to Case

Thank You ...