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## 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.....

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**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 fields feeding 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)
- Template 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**

1. 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.
  - **ID:** Unique system identifier
  - **Field Level:** Select ASSOC\_TYPE
  - **System Code:** Enter "AASGN"
  - **Name:** Enter Default Assignee
  - **Description:** Enter Description

ID	Field Level	System Code	Name	Description	Edit
28	ASSOC_TYPE	TITLE	Case Title	This is a standard Type Column	<input checked="" type="checkbox"/>
30	ASSOC_DECODE	REJECT	Reject Status		<input checked="" type="checkbox"/>
31	ASSOC_DECODE	APPRO	Approved Status		<input checked="" type="checkbox"/>
32	ASSOC_TYPE	BLDG	Blding	*	<input checked="" type="checkbox"/>
33	ASSOC_TYPE	COMPNY	Company	*	<input checked="" type="checkbox"/>
36	ASSOC_TYPE	EMUID	Email Address	Email Address	<input checked="" type="checkbox"/>
37	ASSOC_TYPE	PHONE	Phone Number	Phone Number	<input checked="" type="checkbox"/>
38	ASSOC_DECODE	P0	Priority 0 Type		<input checked="" type="checkbox"/>
39	ASSOC_TYPE	CMPUS	Campus	Campus	<input checked="" type="checkbox"/>
44	ASSOC_DECODE	360PR	360 Review	360 Review associated case type, PP CSP PWO	<input checked="" type="checkbox"/>
45	ASSOC_TYPE	PRNCT	Parent Case Code	This this for parent field code	<input checked="" type="checkbox"/>
46	ASSOC_TYPE	SCOUN	Stem_Country		<input checked="" type="checkbox"/>
47	ASSOC_TYPE	SSTAT	Stem_State		<input checked="" type="checkbox"/>
48	ASSOC_TYPE	SCITY	Stem_City		<input checked="" type="checkbox"/>
49	ASSOC_TYPE	SLOCA	Stem_Location		<input checked="" type="checkbox"/>
50	ASSOC_TYPE	SCOPE	Scope	This is for kanban view	<input checked="" type="checkbox"/>
52	ASSOC_TYPE	AASGN	Default Assignee	Default Assignee for autoassign	<input checked="" type="checkbox"/>

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
- Dropdown Field

**CASES - Case Types | Case Default Assign**

[Edit](#)
[Due Date Threshold](#)
[Email Aliases](#)
[Screen Items](#)
[Keywords](#)
[Fields](#)

Add New

ID	Field Type	Name	Description	System Code	Order	Case Type ID	External Data Source	Show in List	Width	Active	Required	Security	Separator Character	LIST DESKTOP PRIORITY 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	All_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

Showing 1 to 6 of 6 entries

**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).

**Assign Items To...**

- Choose a Single Person
- Choose Multiple People (Note: This option will create a case and assign to each selected user)
- Choose People based on Role Assignments
- Choose People based on Department Hierarchy
- All Employees
- Hoppers
- Case Default**

**Job Preview**

Preview for Force Start
  Preview for Next Run

Preview of JobTest34(Edit)

Total **1 case(s)** will be generated.

Schedule Description: Send One Time Only; Job Runs At: 10/30/2017

Details about cases to be generated:

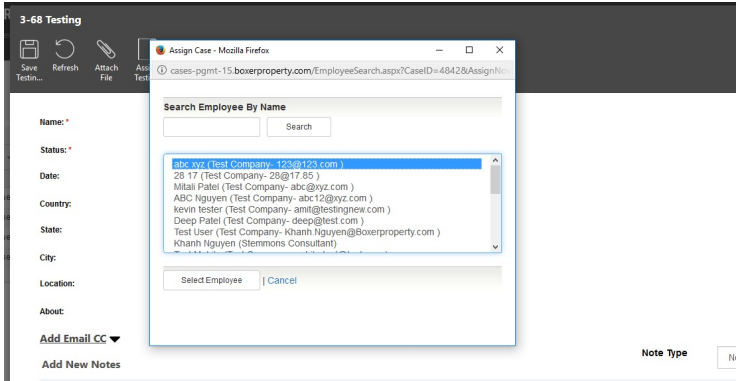
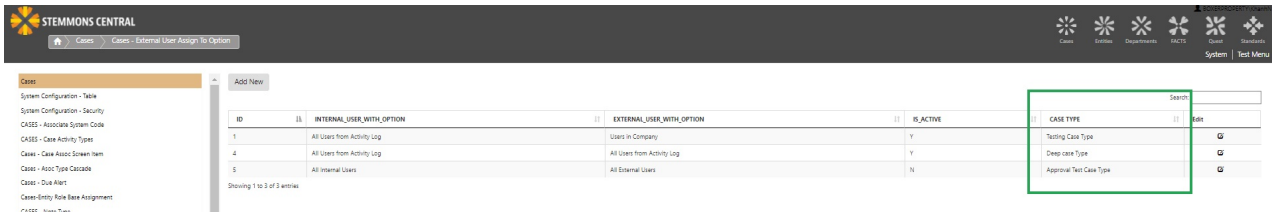
Case to be generated for **Khanh Trinh Nguyen**

**1.4.3 - Configure Assign to Option for External User by Case Type**

The Assign to Option for External User is now configurable by Case Type.

**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.



#### 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.

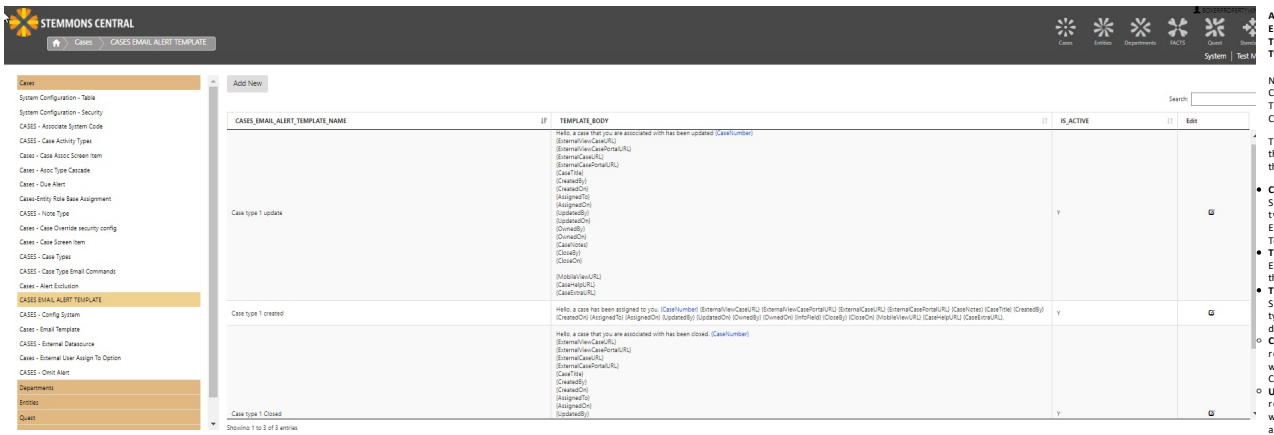
##### Steps to Configure:

##### 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:

- **CASES\_EMAIL\_ALERT\_TEMPLATE\_NAME:** Enter a name for the alert template (anything that would help you identify 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 box to make the alert template active



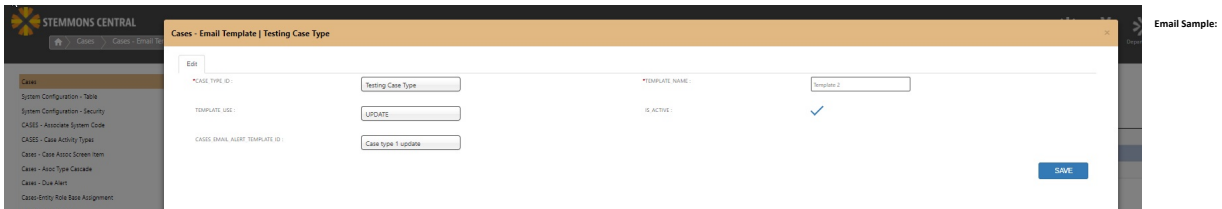
Associate the Email Alert Template to a Case Type

Navigate to the Cases - Email Template table in Cases config.

The following are the fields that is in the table:

- **CASES\_TYPE\_ID:** Select the Case type to apply the Email Alert Template
- **TEMPLATE\_NAME:** Enter any name for the Template
- **TEMPLATE\_USE:** Select the Alert type from the drop down
  - **CREATE:** User will receive an email when they create a Case
  - **UPDATE:** User will receive an email when a Case associated to them is updated.

- **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



Email Sample:

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

URL: <http://cases-pamr-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 10:54:58 AM

Owned by: Test User

Owned on: 10/12/2017 5:17:01 PM

Notes by Khanh Nguyen on 10/26/2017 10:38:28 AM

Update to Case

Notes by Khanh Nguyen on 10/26/2017 10:54:58 AM

Update to Case

Thank You ...

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