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1.11 - Gold Master Version 2.1 - May 2019

   We are very pleased to announce Stemmons Central Gold Master Version 2.1 will be released on end of May, 2019. In this release, there are many newly added features and performance improvements to all applications. The newly added features are related to System's Authentication, Client Relationship Management (CRM), and Updoc.

We are very pleased to announce Stemmons Central Gold Master Version 2.1 will be released on end of May, 2019.This release includes performance improvements to all systems and newly added features to Entities and Updoc. Another major noted enhancements on this release is now Stemmons Central allows users to authenticate using SAML authentication in addition to Active Directory.

Below is a list of the features included with this release:

- **More than 40 performance improvements** – We have a dedicated team working on performance of the system, and we make sure that every process is optimized to its fullest.We always tackle the longest running combined with the most frequently used process, and see what we can do to make it more efficient.
- **Authentication Improvements** – Getting ready for true Multi-Tenant, we have done a lot of improvements to the system taking a step towards true Software as a Service (SaaS).The biggest change here is that the system no longer requires Active Directory to operate, but instead uses Single Sign On (SSO) features.These improvements include:
  - **SAML Authentication** – A protocol used for many enterprise companies to authenticate their users to the system.SAML stands for Security Assertion Markup Language.
  - **WS-Federation Authentication** – A protocol much like SAML but simply uses web services to authenticate.This is very commonly used with onsite Active Directory.
  - **OAuth** – A protocol often used by social/public media sites such as Yahoo, Google, Facebook, etc to authenticate a user to their site.Because this method is robust enough, they allow applications to re-use this authentication.You might see sites such as Pinterest for example allowing you to use these types of authentication methods.

- **Updoc Enhancements** – Including both usability and functional enhancements, we have made tremendous progress to Updoc.Below is a list of the features in Updoc that you will see:
  - **Ability to add a file to an existing Entity** – Now you can associate multiple files to a single Entity in Updoc, this is the equivalent to a Multi-File type document.Please refer to this link for additional information about this feature: https://docs.stemmons.com/AppInfo.aspx?MetaDataID=1498&Value=1.
  - **Improved performance** – In the past when you preview, download or Upload a file, the application would freeze.Now we have optimized the application performing these processes in another thread separate from the UI meanwhile showing the proper status notification in the progress bar.
  - **Checked In/Out Visibility** – Now we show who the file is checked out to and when it was checked out as part of the ownership information in the Metadata pane.
  - **Force Undo Checkout**– Based on security, you can now force check in a file that is checked out by someone else.This does drop the changes that were being made by the other user who originally checked the file out, but they will be able to simply check the file back out once it is available and apply their changes, all the while, each check back in is a different version. Please refer to this link for additional information about this feature: https://docs.stemmons.com/AppInfo.aspx?MetaDataID=1494&Value=1.
  - **Drag and Drop** – Now the system allows full drag and drop into and out from the system, allowing you to drag into and from Windows Explorer, or even Outlook!
  - **Copy and Paste Files**– Much like Drag and Drop, you can now copy and paste files in and out of the system using Windows explorer and Outlook.Please refer to this link for additional information about this feature: https://docs.stemmons.com/AppInfo.aspx?MetaDataID=1499&Value=1.
  - **More files from Entities** – We now process every type of file stored in Entities into Updoc.Before it was just the files stored normally as part of the notes, but now, it includes Single File, Multi File, and even the files in the photo gallery.This allows users to quickly modify these files on the fly.
  - **Dynamic Roaming Path** – We now store the working application files in a roaming folder structure that is dedicated to the user.This allows multiple users to use the same computer with Updoc, including Remote Desktop (formally known as Terminal) Servers.

- **System Codes** – In this release, System Codes will be moved from each application into a centralized Entity Type "System Code" in Entities.
- **"Name in Facts" –** Facts is the Stemmons Central's reporting database.Cases, Entities, and Quest data are synced to Facts as flat denormalized database tables for reporting purposes. In this release, new field "Name in Facts" has been added to the Type and Field configurations to allow the system to provide correct data and backward compatibility for existing reports in the event that the Type Name or Field Name is changed.This field will be used as a base name in the Fact Tables and Fields. If or when the Type Name or Field Name changes, the system will use the base name from the "Name in Facts" field to store the data and new name(s) will be reflected in the Dynamic Views in Facts.This design maintains the data integrity between the underlying systems and Facts. It also provides the backward compatibility to the existing reports when the type or field names are change.

The following are examples scenarios:
1. <u>Creating a "Company" Entity Type:</u>

 - In the Facts Database, a Facts Table will be created from the Entity Type using "Name in Facts" field at the Type Configuration: ENTITY_COMPANY
 - The table will include all field names from "Name in Facts" specified at the Field Configuration. For example: COMPANY_NAME
 - The Dynamic View will be created using the "Name in Facts" field as followed: vw_FACTS_DYN_ENTITY_COMPANY
2. <u>Changing "Company" Entity Type to "Customer"</u>:
 - The Facts table name remains the same: ENTITY_COMPANY
 - In addition to the Dynamic View that was created from the Entity Type (vw_FACTS_DYN_ENTITY_COMPANY), a new view will be created with the new name vw_FACTS_DYN_ENTITY_CUSTOMER
3. <u>Changing field name from "Company Name" to "Customer Name"</u>:
 - The Facts Table Name and the Field Name in the Facts table remain the same.
 - The new Field Name "CUSTOMER_NAME" will be added to in both Dynamic Views vw_FACTS_DYN_ENTITY_COMPANY and vw_FACTS_DYN_ENTITY_CUSTOMER. Data COMPANY_NAME field in the Facts table will be reflected in both views.

- **Static Path Workflow** – Generally, when we write up a process that will become a trigger, we will think of how it could be reused, and we will take the extra time to plan and develop it accordingly.There are times that we need a process that will not be reusable, these times are limited, but they do happen.As a result, Static Path Workflow allows us to write a static design for a specific purpose.
- **Configuration Title Cleanup** – A minor improvement but highly visible. We took some time to clean up the menu item names in the Configuration application.

- **Entities Enhancements**:
  - **Hopper Concept in Entities** – Now we have the Hoppers in Entities, just like Cases.We can assign an Entity to a Hopper.
    1. Please refer to this link for additional information about this feature: https://docs.stemmons.com/AppInfo.aspx?MetaDataID=1501&Value=1.
  - **Unassign an Entity** – Now in Entities we can unassign a hopper from a Person or a Hopper.
    1. Please refer to this link for additional information about this feature: https://docs.stemmons.com/AppInfo.aspx?MetaDataID=1502&Value=1.

  - **Entity Overlay**: To ease data entry, Entity Overlay is a new interface that would allow multiple entity items to be created on one form without having to navigate to multiple pages. Please refer to this link for additional information about this feature: https://docs.stemmons.com/AppInfo.aspx?MetaDataID=1493&Value=1.
  - **Entity Conversion**: Entity Conversion allows one Entity Type to be converted to another or many other Entity Types. This feature especially becomes handy for CRM's related use cases. For example: Lead entity can be converted into Company, Contact, and Opportunity when the lead become more mature.
  - **Entity Copy**: Entity Copy allows users to copy one entity and create a new one with similar metadata. Please refer to this link for additional information about this feature: https://docs.stemmons.com/AppInfo.aspx?MetaDataID=1500&Value=1.

Thank You ...