Release: 1.5

Release Date: August 2017

Included Feature List and details are shared below.

1.3.1 - Localization - Home, Search, Quest, Standards, Departments and CAST

Localization feature allows the applications to support other languages. The current feature will support Spanish version of the applications.

How it works:

Users can change the language preference using the browser's control panel.

- Navigate to the Control Panel of the browser
- Click on the Language Setting
- Adjust the primary language to preferred language
- Save the change and refresh the page.

1.3.2 - Extensible Grid - Home, Search, Quest, Standards, CAST and Departments

The Extensible Grid is used to display information from the Stemmons applications. The grid allows user to view and search information more effectively using its built-in column display, item count, and search function.

1.3.3 - Entity Page Target Handler

This is a configurable option to open Entity item. Depending on the configuration of the Entity Type, when user selects an Entity item, the system will open the item in the format selected.

How it works:

In the Entity Type configuration table, Under the Open Page Type column, user can select from the drop down the format in which the Entity item will open. The options are as below:

- New Tab
- New Window
- Popup Window

- Same Window

If no op on is selected, the default format is a Popup Window.

1.3.4 - Extensible Grid Multi Select Functionality

The multi select functionality allows users to perform actions on multiple items at once such as, close multiple cases and assign multiple entities.

How it works:

User can select multiple items using the check box to the far left of the grid. The Selected option will appear, choose a task from the drop down of the Selected op on to execute the task for all checked items

1.3.5 - JSON Trigger Event Handler

Entities, Cases, Quest, Departments, and Standards Applications can be configured to consume Trigger that can kick off a workflow to perform certain action on a specific event. The Trigger will pass the data object to the web service where the web service has the logic to handle certain process or workflow. For example: When a new entity item is entered, a trigger is enabled to create a case, etc.

User will be able to view the logs for trigger events in the respective application.

1.3.6 - Owner Should be Able to View Security Icon - Entities and Cases.

This feature allows the Owner of Cases/Entities to see the permissions icon within the Cases/Entities item in which they own without the need for Access to Config Security – this feature is configurable by Case Type/Entity Type.

How it works:

To give owners the ability to see the permissions button, navigate to the Case Type/Entity Type configuration table. Check the check box under the Show Permission Icon to Owner column.

1.3.7 - Save Notes on Ribbon Click - Entities and Cases

Notes and metadata will save on selection of the following Ribbon items:

Cases:

Save, Save & Exit, Attach File, Re-open, Approve & Return, Decline & Return, Approve & Assign, Decline & Assign, Resolve & Exit, Take Ownership, Assign To Me, Assign, Assign (Entity Role & Approver List), Forward.

Entity View Page:

Edit Item, Attach File, Take Ownership, Assign Item, Forward Item, Add Notes

Entity Edit Page:

Save, Save & Exit, Attach File, Take Ownership, Assign Item, Forward Item.

1.3.8 - Expandable Text Box Control While Typing - Quest & Departments

A new field type, "Expandable Text", is now available in Quest and Department applications. This field will expand in height as the amount of text within the field.

1.3.9 - Responsive Cards - Search, Standards, Quest, Home and Departments

Stemmons Central Applications are now responsive. The applications will adjust according to the window size.

1.3.10 - New Config UI

Config is now available with a new User Interface! The new config is more user friendly with improved display and navigation.

How it works:

The new config can be accessed using the url: **home.yourdomain.com/config.**

1.3.11 - RSS Blending on Home Page

This functionality allows users to display information from various sources internally on the Home page using RSS feeds. The information displayed would be priori zed based on date and me.

<u>**Note**</u>: Home can display up to 25 posts.

How it works:

To configure the RSS source for Home page:

1. Access the Home RSS Source from Central Configuration.
2. Complete the following fields:
    - **Home_RSS_Source_ID**: Unique system identifier generated by system
    - **URL**: Copy the required RSS feed URL (Note: the system supports only RSS feed URL's which returns XML format data)
    - **Description**: Enter a description of the source
    - **Is Active**: Check the box to make it active.

1.3.12 - Modified Filter Grid for Cases in Home Page

Improved filter grid for Cases List in Home Page. The Case List can now be filter by Cases Assigned to Me, Created by Me, Owned by Me, and Cases Assigned to My Team (cases assigned to direct report).

1.3.13 - Create and View Jump Out Icon in Entity Page

User can now Create and View Related Entity item from within the same screen using the jump out icons.

How it works:

Create and View jump out icon will automatically appear to the right of all external data source fields within an Entity page. This allows the user to create additional data or view existing data for that field without having to navigate to another Entity page.

1.3.14 - Implementation of System Code in Relationship Config

Relationship can now be configured with system code. This is useful when an Entity has multiple fields referencing the same external data source.

How it works:

Without system code: The relationship grid will pull in all Entity item that reference the external data source value (example USA), regardless of which field the value is in.

Relationship grid will pull in only Entity item that reference the external data source value (example USA), for field with the same system code specified in relationship grid.

1.3.15 - Jump Out Icon

Entity items are now displayed with a jump out icon next to it. Once clicked, the jump out icon will open the Entity item in a new tab.

1.3.16 - Entity Item Export to PDF

User can now export an Entity Item page to PDF using the Export to PDF in the ribbon menu.

1.3.17 - Entities Origination Center

Entities Origination Center now has more columns in addition to the Active and Inactive columns - Total, Assigned to Me, Created by Me, Owned by Me, Associated to Me (through Entity Role/Entity Type), Inactivated by Me, and Owner.

1.3.18 - Security Feature for Entity Role Relationship

Admin users can now provide other users with the permission to associate Entity Role/ Entity Type without providing Departments access to those users. The permissions are configurable per Entity Type. The security button can be found within the Entity Role/ Entity Type Admin Screen in Departments.

1.3.19 - Add Start/End Date field in En ty Role Assignment - Entity

Users are now able to input Start/End Date when assigning Entity Role and Entity Type through Entities.

1.3.20 - System Code for Publishing Purpose

This feature allows the user to publish Entity information to an XML feed using configurable Publish field.

How It Works:

This feature works with the implementation of the [PUBLS] Publish system code and is configurable per Entity Type. For a complete instruction on how to set up an XML feed for an Entity Type, please refer to the Stemmons Central User Manual>Entities>System Code for Entities Publishing Purposes

(Available in GM 1.5).

1.3.21 - Hot Swap Templates in Entities

This feature enables users to swap between different customized templates in Entity. Configurable by Entity Type - both List and Entity Item View.

1.3.22 - View Entity Body Template

This feature enables the user to apply HTML Template to En ty Body. The information within the Entity body will display on the HTML codes written.

1.3.23 - Signed Installer for External Entities

Implementation of Installer for External Entities

1.3.23.1 - External Entities Menu Item

External Entities installer is available for download under the En es Navigation Menu.

1.3.24 - FACTS Feature for Cases

This feature allows the user to sync Cases data to FACTS database. The sync is configurable per Case Type.

1.3.25 - Calculated Field for Cases

User can now perform calculations in Cases using the Calculation field type.

1.3.26 - Lookup Control for Cases

Users can now use Lookup controls in Cases with the implementation of the Lookup field type.

1.3.27 - External User: Configurable Assign to Option for External User

This feature provides users with the op on to allow or not allow External Users to see Internal or External Users in the assign to field.

How It Works:

User can configure External User Assign to op on using the External User Assign to Op on Configuration table. The following are the options:

- **Internal User**
  - All Internal Users: External User will be able to see all Internal Users in the Assign To list
  - All Users from Activity Log: External User will only see only Internal Users that are listed in the Activity Log of the case in the Assign To list

- **External User**
  - All External Users: External User will be able to see all External Users in the Assign To list
  - All Users from Activity Log: External User will only see only External Users that are listed in the Activity Log of the case in the Assign To list
  - User in Company: External User will only see External Users that are in the same company as them

1.3.28 - External User: Remove Certain Ribbon Items for External User

External User will see a limited Action in Cases ribbon.

1.3.29 - External User: Case Count in Origination Center Should Only Display Cases that the External User has Access to

The Case count in the External User's Origination Center will only reflect Cases in which they have access to.

1.3.30 - External User: Automatic Read & Update Rights to Case when External User Creates Case

When an External User Creates a Case, automatic Read and Update rights will be granted at the Case level to that External User. This will prevent other External Users from being able to view the Case.

1.3.31 - Move Note Type in Cases Web and SharePoint

The Note type drop down has been moved to upper right corner of the Notes sec on. Functionality has not been affected.

1.3.32 - Related Cases in Cases

This functionality in Cases allows the users to display all related cases under a single parent case. User can also configure the related case to accept Case Notes and Closed Status change from the parent case - if a parent case is closed, all the related cases will be closed and if parent case's notes is updated, all the related cases will also receive the notes.

For more information on how to configure a Parent Case to Related Cases, please refer to the Stemmons Central User Guide>Cases>Related Cases in Cases (Available in GM 1.5)

1.3.33 - Case Portal

This feature provides users outside of the system the ability to create cases online using their name and email address. Users will also have the op on to create their own account to track cases they've created. The Case Type in which a user outside of the system can access is configurable.

1.3.34 - Pass in Query String Parameter with System Code and Value to Return Specific List

User can use query string parameters using system code and value to call a list of Cases that meets criteria(s). This is useful when user wants to search for Cases meeting certain criteria across, whether within a Case type or across all Case type. For example, user can call a Case list of all Cases with a status of New or all Cases with a priority of High and a Due Date of 9/12/2017

How It Works:

To call the list, use the url:
cases.yourdomainname.com/CaseList.aspx?SystemCode=entersystemcodehere: enter value here

To include more than one criterion, user can use the vertical bar between each criterion.

Ex: To call a list of Cases with the word "Testing" in the Title and a Status of New, user will enter the following in the URL: cases.yourdomainname.com/CaseList.aspx?SystemCode=TITLE: Testing |STTUS: New.

1.3.35 - Lookup Control for SharePoint

Implemented Lookup Control for Cases in SharePoint

1.3.36 - Allow Decimal Points in Quest

Scores in Quest forms can now be configured using decimal points.

1.3.37 - Date Picker Control for Quest Item Info Field

Date field type is now available in Quest! The Date field type will open a Calendar control in which users can select a date. This will provide consistency in Date entry and eliminate inconsistent Date entry format.

1.3.38 - Job Function, Job Title, Basic Name, and Sub Department Does Not Need to be Unique

Job Function, Job Title, Basic Name, and Sub Department can be duplicated if they are under a different Top Level. Only the Top Level in the Department structure is required to be unique. This will allow us to assign the same Job Title across different Departments.

1.3.39 - Modify Employee Deactivation/Rehiring Process

The Deactivation/Rehiring Process has been modified as below:

On Employee Informa on Screen-

1. Termina on Date Field is Read Only field
2. Allow users to enter any Termina on Date (Past, Current, and Future)
3. If Termination Date entered is <=today - deactivate the account immediately
4. If Termination Date entered is > Today
   a. confirms with user via a message below termina on date field: "Termina on date is a future date. This account will be deactivated on the termina on date specified above."
   b. deactivates the account via service once the termina on date is reached.
5. Activate account for Rehire - blank out Termina on Date field.

1.3.40 - Calculated Field for CAST

User can now use the Calculated Field for CAST application

1.3.41 - CAST: Filters for the List for CAST Jobs and Remove Certain Columns

We have implemented filters for the CAST application and revamped the CAST grid by relocating a few columns to different screens

1.3.42 - CAST: Modify CAST Assign To Op on to Consider Start Date and End Date for En ty Role Relationship

CAST has been modified to check for active Entity Role association when genera ng Cases that are assigned to Entity Roles.

How It Works:

The cases will only generate with the following scenarios:

- If Current Date (when the Job runs) is >= Start Date and <=End Date of the Entity Role association.
- If the En ty Role association does not have Start Date and End Date
- If the En ty Role Association has a Start Date<= Current Date but no End Date
- If the En ty Role Association has no Start Date but End Date >= Current Date

1.3.43 - Mobile: Add Save and Save & Edit Button

We have implemented the Save and Save & Exit button of the View/Edit screens for Cases and Entities application in Mobile.

1.3.44 - Single A Record and/or a Single Domain for all the Stemmons Apps

A feature for Single A record for all our apps and services has been implemented. Such as Stemmons.mycompany.com. If this is done, then user should be able to navigate to each application by going to Stemmons.mycompany.com/**Application Name (Cases/Entities/Departments, etc.)**

1.3.45 - Kanban View for Cases and Entities

We have implemented a new Management Tool called the Kanban View for Cases and Entities applications which will help users track status for Cases based on a defined scope. The Kanban View button can be found on each Cases/Entity Type ribbon.