

# What's New in WEBcnx V4

**Matthew Johnson (26<sup>th</sup> May 2015)**

**Document version: 3.0**

This document contains details on the new features in WEBcnx. This document applies to only the specified version of WEBcnx.



**ARDEN SOFTWARE**

## Confidentiality Notice

---

© 2015 Arden Software Ltd.

All rights reserved. This document contains privileged and confidential information intended only for the use by individuals authorised by Arden Software Ltd. The information may not be used, disclosed or reproduced without the prior written authorisation of Arden Software Ltd.

This document supersedes all previous dated versions.



# Contents

Overview .....	5
Task Management.....	6
New Task Dashboard .....	6
Task Easy Edit.....	6
New Task Browser.....	7
Job Subscription Revamp .....	7
Contributors* .....	7
Subscribe Other Users to a Task .....	8
Discussion Notifications .....	8
Task Visibility vs. Customer Visibility .....	8
User Task Visibility .....	9
User Definable Email Templates* (Only available for Google Chrome and Mozilla Firefox Users) ...	9
Design Library .....	9
New Design Library Dashboard.....	9
New Design Browser .....	10
User Group Design Views.....	11
Recently Viewed Layers .....	11
Composite Layer Browser .....	11
Customers .....	11
New Customers Dashboard .....	11
Customer Contacts* .....	12
Subscribe to this Customer .....	12
Standards Library .....	12
New Standards Library Dashboard .....	12
Reports.....	13
New Reports Dashboard.....	13
Chart Changes .....	14
User Interface .....	14
Launch Menu .....	14
Browser Configuration.....	14
More Browser Views.....	15
Browser Persistence.....	16
New Browsers to Display Lists of Data.....	16
Navigation Menu Simplification.....	16
Searches.....	16



Saved Searches .....	16
WEBcnx Quick Search .....	17
Hit 'Enter' to Search .....	18
Improved User and User Group Selector .....	18
Users & User Groups .....	19
User Group Types .....	19
User Group Type Access Rights .....	19
User Statuses .....	19
User Specific Database Windows .....	20
Expanded User Notification Rules .....	20
User/User Group Task Templates .....	20
Primary User Groups .....	21
Workflow Automation .....	21
New Workflow Designer Features .....	21
New Workflow Methods .....	22
Workflow Created Tasks Modifiable during Creation .....	22
Architectural Changes .....	22
WEBcnx 64-bit* .....	22
Windows Admin Tool* .....	22
Login/Logout .....	23
Improved Login Page .....	23
New User Inactivity Handler .....	23
Miscellaneous .....	23
Online User Help Guide .....	23
Performance Improvements .....	24



## Overview

---

This document covers the new features introduced in version 4 of WEBcnx. Many of these features can be utilised out-of-the-box; however, several may require configuration changes, i.e., where an existing website installation is to be upgraded. Such features are identified throughout this document by an asterisk (\*).

Accompanying documentation can be provided covering any and all upgrade steps. This includes both site and database upgrades, and new and enhanced feature configuration.



# Task Management

## New Task Dashboard

The Task Management Dashboard had been restyled in order to conform to the new look and feel of WEBcnx V4. This means that it has been converted to a widget based display with updated browsers. The content of these browsers is controlled by the Saved Searches (see page 16) that are located within the “My Summary” widget. Users can drag and drop the name of a search onto the desired widget and the browser will display the results of that search, giving the user complete control over the data that is displayed on their Dashboard.

Each widget also contains some contextual actions which can be used to interact with Jobs and Tasks directly from the dashboard in a way that was not previously possible. This greatly speeds up processes such as deleting tasks, as there is now no requirement to navigate to the Task view. A search functionality has also been introduced in certain browsers, which allows users to quickly find certain tasks within even the most cluttered of widgets.

The screenshot displays the WEBcnx Task Management interface. It features a sidebar with navigation options like 'TASK MANAGEMENT', 'DESIGN LIBRARY', 'CUSTOMERS', 'STANDARDS LIBRARY', 'REPORTS', and 'ADMIN'. The main area is divided into several widgets:

- My Items:** A table listing tasks with columns for Item No., Type, Subject, Assignee, Customer, Date Created, and Date Due. It shows 25 out of 28 items.
- My User Group Items:** A table listing design requests with columns for Item No., Type, Subject, Assignee, Customer, and Date Created. It shows 25 out of 43 items.
- My Summary:** A summary table with columns for Name, Description, and Count. It lists various categories like Drafts, High priority Items, Items due today, etc.
- Jobs and tasks I created:** A table listing design requests with columns for Item No., Type, Subject, and Assignee. It shows 23 items.
- Items I'm Watching:** A table listing design requests with columns for Item No., Type, Subject, and Assignee. It shows 5 items.

The new Task Management Dashboard

## Task Easy Edit

The process of editing the attributes of existing tasks has been made incredibly quick and simple. Select the task(s) that you wish to edit and then choose which attribute you want to edit for those tasks using the actions located within the edit drop-down list. Multiple tasks can have attributes set at the same time and are selected by using shift+click and ctrl+click controls.



Item No.	Type	Subject	Assignee	Customer	Date	Priority	Status	Due Date	Date Due
J0083	Job	London Olympics 2012 - Clock Box	Matthew Hewitt	Igle Sports	25	16:47		03/03/2015 23:30:00	
J0087	Job	AIT Graphics Card - 2012 (Windows 8 compatible)	Matthew Hewitt	YCX Electronic Co. Ltd.	26	51:18		07/03/2015 23:30:00	
EQ00087	Enquiry	AIT Graphics Card - 2012 (Windows 8 compatible)	Matthew Hewitt	YCX Electronic Co. Ltd.	26/02/2015 08:12:04			07/03/2015 23:30:00	
J0089	Job	Tesco Biscuit Assortment	Matthew Hewitt	Real Foods PLC	26/02/2015 09:57:17			09/03/2015 01:00:00	
EQ00148	Enquiry	Tesco Biscuit Assortment	Matthew Hewitt	Real Foods PLC	28/02/2015 13:51:16			02/03/2015 23:30:00	
J0109	Job	CD Spindle Pack x80 Discs	Matthew Hewitt	YCX Electronic Co. Ltd.	28/02/2015 09:01:58			04/03/2015 23:30:00	
J0114	Job	Rexel Stapler Multi-buy pack x6	Matthew Hewitt	Saxons Stores PLC	28/02/2015 14:28:35			04/03/2015 23:30:00	
J0115	Job	Chris' Salty Crisps	Matthew Hewitt	Real Foods PLC	28/02/2015 14:47:45			04/03/2015 23:30:00	
J0116	Job	Marshmallow Pillows	Matthew Hewitt	Real Foods PLC	28/02/2015 14:52:07			04/03/2015 23:30:00	
J0121	Job	Borgen's Sweets 600g Jelly Beans	Matthew Hewitt	Real Foods PLC	28/02/2015 16:10:31			04/03/2015 23:30:00	
J0122	Job	Andrax Toilet Tissue	Matthew Hewitt	Saxons Stores PLC	28/02/2015 16:36:13			04/03/2015 23:30:00	
J0123	Job	John's Saddles	Matthew Hewitt	Igle Sports	28/02/2015 16:45:51			04/03/2015 23:30:00	
J0124	Job	Diet Cake	Matthew Hewitt	Real Foods PLC	28/02/2015 16:54:27			04/03/2015 23:30:00	
J0125	Job	ChocFree Easter Eggs Shipper	Matthew Hewitt	Real Foods PLC	28/02/2015 17:02:29			04/03/2015 23:30:00	

Editing task attributes takes place within dialogs which means that the user is no longer navigated away from the list view.

## New Task Browser

The browser used to display tasks has been updated, bringing with it a host of improvements. Most notably, paging on demand. The speed at which data is retrieved and displayed within the browser has improved and being able to dynamically page through gives users a much more robust method of browsing tasks.

## Job Subscription Revamp

Subscriptions have been tweaked slightly so that when a user subscribes to a job, they are automatically subscribed to all tasks within that job. It is felt that this change brings the action of subscribing to a job more in-line with what users expect.

## Contributors\*

Contributors are a collection of users that have in some way been involved in the progress/completion of a job or task and can be accessed when a user wants to notify users they are adding a note or discussion to the item. The user sending the notifications can pick and choose those contributors that they wish to notify. It is also important that Users are able to contribute to a task in some way without being automatically added to the "Contributors" list. For this reason, there are some opt in/out options which can be configured via the User Profile.

General List Preferences My User groups Automated notification rules Subscriptions (1) **Contributions** Out of Office Options Task Templates Jobs & T...

Select All Select None Toggle Selected

Consider me a contributor when...

**For all items**

- I created it
- I requested it
- I have edited it at some point
- It is currently assigned to me, or was at some point in the past
- It is currently assigned to one of my user groups
- I added a document to it
- I added a discussion to it
- I added a note to it
- I created the Impact project associated with it
- I last modified the Impact project associated with it
- I created the Impact layer associated with it
- I last modified the Impact layer associated with it
- I am subscribed to it
- I am subscribed to the customer of it
- I am the secondary contact for the user assigned to it, that user is out of office and I am not

**For Jobs**

- It contains a Task that I created
- It contains a Task that I requested
- It contains a Task that is currently assigned to me

## Opt in/out Contributor criteria

## Subscribe Other Users to a Task

Another action that has been added is the ability to subscribe another user to a task. This functionality should be used when you wish to keep another user (such as a manager or colleague) informed on the progress of a task, similar to copying them in on an email.



**The new subscription dialog with a User search tool.**

It should also be noted that the user can choose to view the list of contributors, as opposed to searching through all Users, to find those that they wish to subscribe to a task. This list of contributors will likely contain many of the users that will want to be subscribed to a task and will greatly speed up the process of adding multiple subscriptions.

## Discussion Notifications

Similarly, you can now also choose to notify contributors when adding a discussion to a task/job. It is assumed that all those users that have contributed to a task will be interested in the discussion and so appear in the “Selected” column by default. However, should there be a user that is a contributor that you do not wish to notify, they can be moved across to the “Available” column and will not receive a notification.

## Task Visibility vs. Customer Visibility

Previously, it was not possible to assign a job or task to a user if the customer associated with that item was not visible to them. This makes sense, but there are specific use cases when it may be desirable to expose a Customer to a certain user in the context of an individual job and not necessarily for all jobs that currently exist for that customer. If an item is assigned to a user that cannot view the associated customer, the user that is assigning it will be warned of this and will have to confirm the action.





## User Task Visibility

To be consistent with the way task privileges work, any job that is assigned to a user or user group should be visible to that user group or the user group members. This was not the case previously and meant that it was possible for a user to have something assigned to them that they could not see.

## User Definable EMail Templates\* (Only available for Google Chrome and Mozilla Firefox Users)

It is now possible for users to define their own email templates, giving them freedom to structure automated emails in a way that makes the most sense for their users and customers. Firstly, a culture for the template needs to be specified. If an applicable culture has been defined, WEBcnx will automatically change the language that email is sent in based on the language of the receiver. There are also 4 different contexts in which an automated email can be sent from within WEBcnx:

- Jobs or tasks are created
- Jobs or tasks are modified
- The approval outcome for a job or task is assigned
- A note is created for a discussion

This means that a different template can be defined for each context. It should be noted that if a template is left blank, then when an email is sent for that context, it will appear blank to the receiver, so templates should be defined for every context. Finally, there are a number of tokens that the user can insert into the templates so that some contextual information can be given to the receiver of the email. In order to make the design of these emails as easy as possible a list of the usable tokens is given underneath the template, providing the user with readily accessible information as to which tokens they can use for that particular context.

## Design Library

---

### New Design Library Dashboard

The Design Library Dashboard has switched over to the widget based style with individual widgets for:

- Layers I've Recently Viewed
- Projects I've Recently Viewed
- Drawing Import
- Search/Browse
- Saved Searches
- Unsaved Drawings (only available to users that can create standards and/or import files)
- Working Projects (only available to CAD users)

Those widgets that are used to display projects/layers also benefit from a choice of views that can be used to display them. By default, the widgets will take up the full width of the browser and if the user reduces the width, the widgets will intelligently re-arrange to suit the width of the page. The process of importing a drawing has also been simplified. The old architecture remains but if the user chooses, they can directly import a drawing using drag and drop functionality. Simply drop the file on the Import widget and it will be imported.



### The new Design Library Dashboard

## New Design Browser

A new browser has been implemented for the Design Library, it loads within a modal dialog and so eliminates the requirement of users navigating away from the dashboard whenever they want to browse drawings. The method of navigating through the folders has also been tweaked. The contents of the folders are now loaded on-demand rather than when the browser is loaded, giving a big performance boost to the initial load time of the browser. It is also possible to search for drawings by customer. The “My Customers” list will appear when the user first selects the search. If the desired customer is not in that list, then the user can begin typing the name of a customer and the list will update, automatically returning a list of customers that match the criteria entered by the user, without them having to press a search button.

### The new project and layer browser

## User Group Design Views

It is now also possible for Design Views to be controlled from the context of a User Group. This makes the process of giving a particular User Group a view different from the system default much quicker. Previously, the only way this was possible was for the new view to be assigned to each member of the User Group individually, a massive inconvenience in User Groups that contained many Users. There is a new admin option called “Database Lists” under the Features section which controls the management of these views. A new privilege “Create and Modify Database Lists”, controls a user’s access to this. The new views can be applied to User Groups from the “Database Lists” tab in the User Group Profile.

## Recently Viewed Layers

The concept of Recently Viewed Layers has also been introduced to the Design Library Dashboard. In recognition of the fact that a large number of Users interact with Layers more than Projects, this widget is displayed in the primary location on the Dashboard. It shows the user a collection of the layers that they have recently viewed, with the most recent appearing first. This browser supports all the newly introduced display views and the information that is contained within it is persisted across sessions.

## Composite Layer Browser

A composite layer browser has been introduced, the purpose of which is to control the information that is displayed for Layers dependent on the context in which they are being displayed. As there is only a certain amount of space available for information to be displayed (especially in the new Card, Content and Tile views). It does not make sense to occupy this space with information that the user already knows. A good example of this is a Layer displaying information about the project it belongs to. Although this may be desirable from the Design Library Dashboard, it is effectively just duplicated data from within the Project View, so it makes sense to show different data between the two. This helps to ensure that data displayed to the user is always relevant and useful.

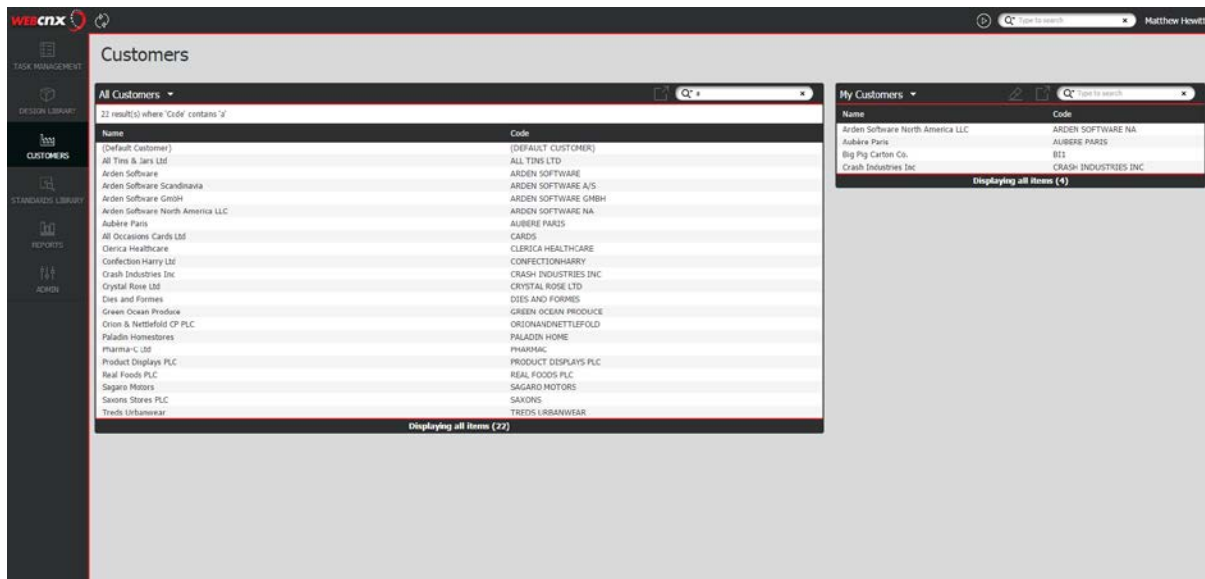
## Customers

---

### New Customers Dashboard

The new dashboard consists of two widgets “All Customers” and “My Customers”. As these widgets do not contain any CAD data, the only view applicable to them is the detail view. The “All Customers” widget is searchable, sortable, contains details on all Customers and is an extremely useful tool for locating customers. The “My Customers” widget has replaced “Recent Customers” and is a list that can be customised by the user by dragging a Customer over from “All Customers”. The contents of this browser will be reflected in the default drop down list that will appear whenever that user has to select a customer. It is also possible to remove Customers from “My Customers”, making it possible to better manage the Customer list. Customer’s profiles can be accessed from this dashboard and it should be the first place a user navigates to when they are looking for Customer specific data.





The new Customer Dashboard

## Customer Contacts\*

It is now possible to associate users with customers. Users that are linked with Customers in this way are referred to as “Customer Contacts”. The concept of customer contacts has existed before within WEBcnx. However, these contacts were not WEBcnx users that could log on and interact with current jobs and tasks. All customer contacts should belong to a User Group which is of type “Customer”. Having a “Customer” User Groups means that users within them can only have privileges assigned that are intended for Customer use and helps to keep a clear distinction between regular users and customer contacts.

## Subscribe to this Customer

A new action has been added on the Customer Profile that allows a user to subscribe to a Customer. A Customer subscription is split into two parts; receiving email notifications and watching tasks. Should a user choose to receive email notifications then their automated notification rules will be updated to show that they’ve requested email notifications for that customer. Likewise, if a user chooses to receive email notifications for a customer using user profile features, they will be shown as a subscriber of that customer. Any new jobs or tasks that are created for the customer will automatically be added to the user’s “Items I’m Watching” list on the Task Dashboard, should they select that option.

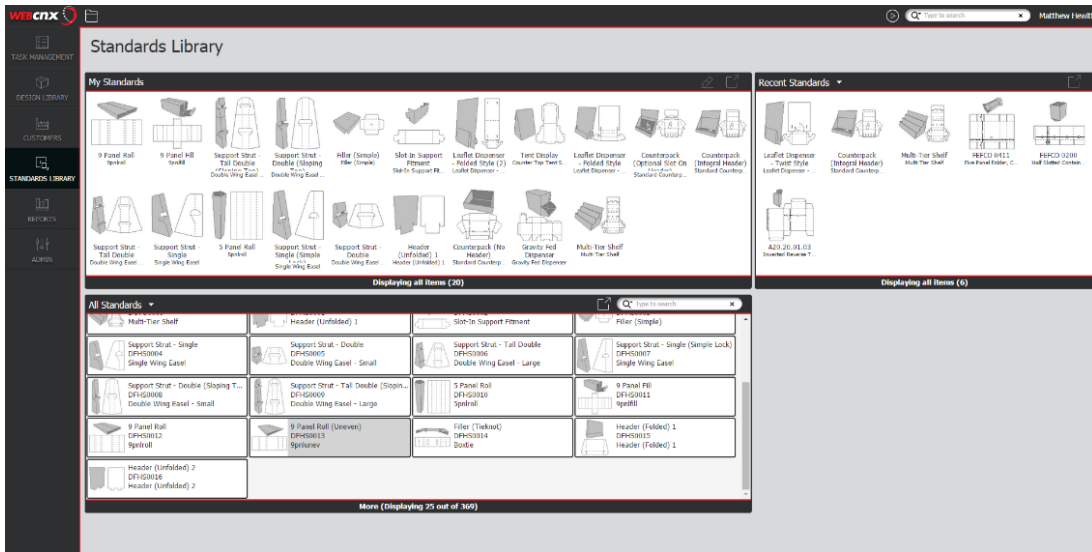
## Standards Library

### New Standards Library Dashboard

The Standards Library Dashboard has been updated and now uses the new widget based browsers to display information. “Recent Standards” remains but has been shifted from the primary position on the dashboard. This is now occupied by the “My Standards” browser, this is an editable list in which the user can place their most used standards ensuring that they can always find the most popular standards easily. There is also an “All Standards” widget, which is both searchable and sortable, giving users an incredibly easy way of finding any standard. The Standards browser also remains. However, it has been removed from the Dashboard and is accessible via an action on the



action bar. Should the user want to use it, it will load a dialog which contains an updated but familiar version of the browser.

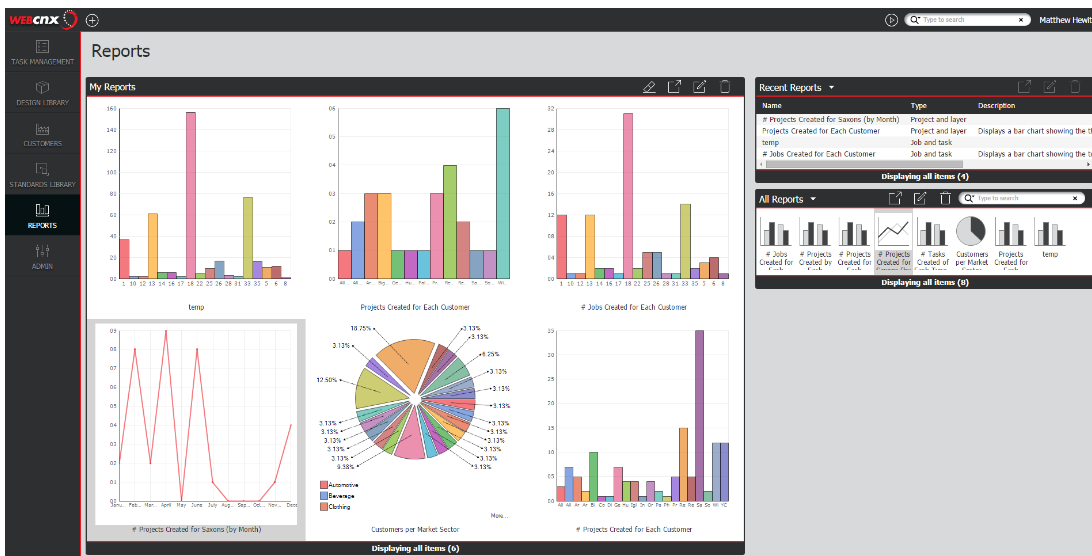


The new Standards Library Dashboard

## Reports

### New Reports Dashboard

The Reports Dashboard has received an update and has shifted to a more graphical, widget based design. It also benefits from the addition of new views that can be applied to the Recent Reports and All Reports widgets. The bulk of the dashboard is occupied by the My Reports Widget which loads a smaller versions of the reports (as opposed to details about the report) this allows users to see the content of reports without having to navigate to the report view. If the user wishes to see the full version, they can do so by double-clicking the desired report. The reports now load within a dialog, rather than a new page, making navigation between reports and the dashboard seamless.



The new Reports Dashboard when populated with some reports



## Chart Changes

Charts have been tweaked slightly to make them a bit more user-friendly. Firstly, the way that the colours are used in Reports has been changed. The colours that were used were generated both randomly and on-demand for each instance of a report. So one user could be looking at a report and talking about a column that is red when for another user it appeared as blue. The colours used in reports are now consistent across all instances of that report, ensuring that they look identical to all users.

Radar, Funnel and Histogram chart types have also been added in order to support a wider variety of reporting methods, including displaying charts representing the sales pipeline.

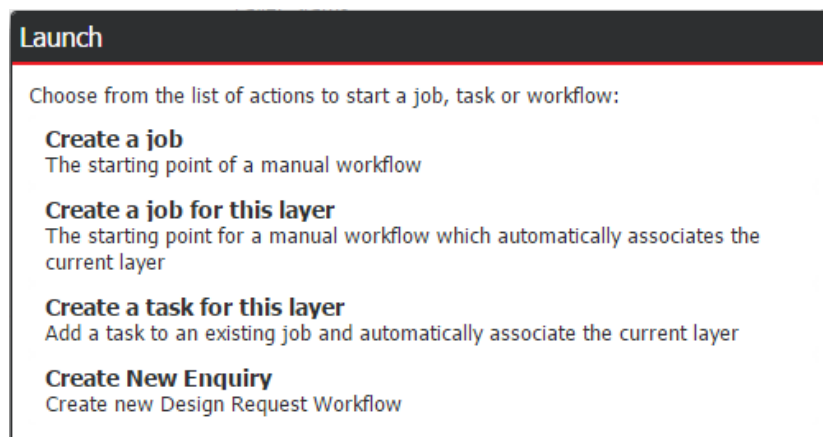
## User Interface

---

### Launch Menu

This is a new feature that makes the launching of a new Job, Task or workflow more intuitive. Users now have a single place to go to start a new process. The introduction of the Launch Menu allows users to navigate around WEBcnx quickly and efficiently by making the most commonly used actions easily accessible, such as adding a task to a job. The items that appear within this menu depend on the context in which it has been called and whether the current page is the location of any Execute Workflow Custom Actions (as they will all now appear within this menu). The Launch menu intelligently filters the actions that it displays to users. For example, if you call the Launch menu from the Layer View, there are extra options to allow you to “Create a job for this layer” and “Create a task for this layer”, which are unavailable from any other context.

Another benefit of this feature is that it has helped to reduce toolbar clutter.



The contents of the Launch menu when run from the Layer view

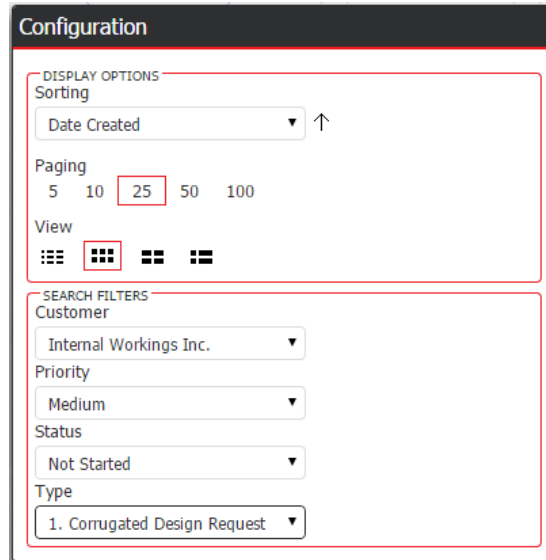
### Browser Configuration

The browsers that are used in WEBcnx V4 are much more customizable than in previous versions, this allows users much more control over how information is displayed. A list of the different browser components that can be configured is below:

- Sort field + Sort order
- Default Paging

- View
- Search Filters

These values can be accessed by selecting the downwards arrow located just to the right of the name of the browser.



An example of settings that can be configured

## More Browser Views

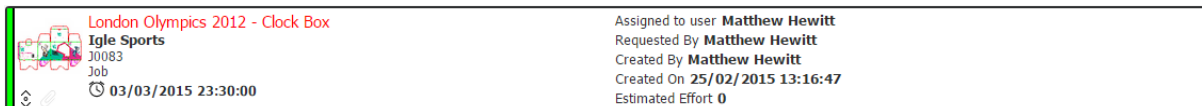
There are now a variety of views that users can choose from when it comes to displaying information within WEBcnx. The new views that have been added are the Card, Content and Tile views, which give users a more graphical representation of data than the Detail view.



Tile View



Card View



Content View

## Browser Persistence

The visibility state of browsers within WEBcnx are now saved, users are able to navigate to another area of WEBcnx or logout whilst maintaining their browser appearance, providing a much more intuitive and flexible way of controlling how browsers display information. This persistence has rendered many of the old “List preferences” redundant, so this has now been reduced to just one option, allowing users to select their default display mode. This default display mode can be overridden, however. If the user changes the view of a browser it becomes ‘persisted’ and effectively saved. This also means that different browsers can have different views, even if they are on the same page, bringing a whole new level of customisation.

## New Browsers to Display Lists of Data

The new browsers that have been put in place are responsible for the retrieval of data, the population of a view and the way in which items are displayed. The browsers consist of three parts:

- Action bar- Used to display a title for the browser along with contextual actions. Only actions that are related to the content of the browser will be found here.
- Views- Responsible for the way items are displayed within the browser. The view can be customised in a number of ways from within the browser.
- Footer- Displayed at the bottom of the browser and has two purposes, the first is to act as a button to further populate the browser (if all results are not currently displayed) and the second is to give textual feedback about the data being displayed, such as the total number of items.

## Navigation Menu Simplification

The navigation menu has been greatly simplified. The introduction of the launch menu and action bar items has meant that the sub-menus that were present in previous versions have been replaced and removed, with the User being navigated to the relevant area of the site when they click its icon. The only exception to this rule is the ADMIN section due to the fact that there are so many different pages that the only feasible way to navigate around them is by using a navigation menu. There has also been the addition of the “Customers” section, which makes locating and interacting with customer records much quicker and easier.

## Searches

---

### Saved Searches

When a User has defined a particularly useful search, such as all tasks that belong to their biggest customer, the search can now be saved and re-run at any time. Although, this is a relatively simple example, the real strength of this tool is the time that it will save users that have had to enter the same, complex search on multiple occasions throughout their use of previous versions of WEBcnx.

Saved Searches can be run for both Jobs & Tasks and Projects & Layers and are accessed primarily from the respective search pages for each. From here, a user can manage their list of saved searches using the “My Saved Searches” action, which causes a dialog to appear containing a list of all saved searches associated with that user. Any search can be deleted if no longer needed as well as having its name and description edited to something more suitable. A saved search can also be run from this dialog by either double clicking it or using the associated action. Once a saved search is run, the





criteria of the search will populate the search fields and the results will display. This makes it incredibly easy to tweak saved searches, as all the user has to do is run an existing search and then modify one or two criteria. If the user wants to save a new search, they should use the “Save current search” action and provide a name and (optional) description.

Saved Searches are also accessible from the Task Dashboard inside the “My Summary” widget. Having them located here gives users a convenient way to display those tasks that are most relevant to them. For example, they might log in and then want to view all the items that are due to be completed on that day, so that they can prioritise their workload. Running a saved search from this location will cause the results to appear in a dialog from which the user can navigate to the job/task view of any returned item.

## WEBcnx Quick Search

A new master quick search feature has been implemented across all areas of WEBcnx, this has been introduced to give users a method of being able to locate certain items within WEBcnx, no matter which page they are currently viewing and can be found on the action bar. The criteria that can be searched on is as follows:

- Customer
  - Code
  - Name
- Project
  - Code
  - Description
  - Reference
- Task
  - Item No.
  - Subject

The appearance of these criteria is restricted by the current user’s privileges. For Instance, if a user cannot see customers, then none of the Customer search criteria will display. Searches are run by pressing the return key and all returned results are displayed in a modal dialog, which gives the user quick and easy navigation to the page that they were previously viewing if needed. If multiple criteria have been used in the search and it returns results from multiple areas of the site, the results are automatically filtered into Customers, Projects and Tasks tabs, with a count indicating how many results they each contain. This is done in order to keep all the relevant results together and helps to keep the results set of even the broadest search relatively targeted.

If the user does not locate the result that they were searching for, there are actions on the Projects and Tasks tab that will re-direct them to the advanced search feature for each area, where they will be able to run a more targeted search. If the desired item is found, then the user can either double click it or use the corresponding action to be redirected to it. In the event that only 1 result is returned from the search, the user will be navigated to the view of that item, replicating the functionality that was previously available in the Quick Open feature.



Search

587 results were found for 'a' on Customer (Code, Name) Project (Code, Description, Reference) Task (Item No., Subject)

Customers (26)  
Projects (217)  
Tasks (344)

Item No.	Type	Subject	Assignee	Customer
EQ00384	Enquiry	Frank 's Sportsware		Igle Sports
EQ00481	Enquiry	Carlos' Pizza Suprise		Winterbury Stores
EQ00509	Enquiry	FH-Stilles Wasser		All Occasions Cards
SR00090	Sample Request	Chilli sauce dispenser samples	[Administrators]	Saxons Stores PLC
SA00043	Sample Approval	Wireless Photo Frame SCP2432	Albert Prince	Green Ocean Produc
J0043	Job	Wireless Photo Frame SCP2432	Albert Prince	Green Ocean Produc
DR00142	Design Request	Transportverpackung Glühlampen	Albert Prince	YCX Electronic Co. L
SR00034	Sample Request	Product Display Stand (Part 1)	Carl Manifold	Green Ocean Produce
SR00036	Sample Request	Product Display Stand (Part 3)	Carl Manifold	Green Ocean Produce
J0034	Job	Product Display Stand (Part 1)	Carl Manifold	Green Ocean Produce
J0036	Job	Product Display Stand (Part 3)	Carl Manifold	Green Ocean Produce
J0214	Job	Carl's Test 1	Carl Manifold	(Default Customer)
EQ00462	Enquiry	Carl's Test 1	Carl Manifold	(Default Customer)
J0215	Job	Carl's Test 2	Carl Manifold	(Default Customer)

More (Displaying 25 out of 344)

An example results set from a WEBcnx Quick Search

## Hit 'Enter' to Search

In order to bring WEBcnx in line with many other applications that give their users the ability to search, searches can now be executed by pressing the return key as well as the action which runs the search. This removes a lot of the frustration that some users felt as pressing the return key when searching wouldn't do anything, especially when it meant the user would have to scroll down the page to actually execute the search (something that did occasionally happen on the advanced search pages).

## Improved User and User Group Selector

Previously, when a user had to locate another user or User Group, a dropdown list was used. Although perfectly acceptable for sites containing a small to medium number of users, it was found that there were a number of problems with this method in environments that contained a lot of users split into a large number of User Groups. Firstly, it could be difficult for some users to find one specific entry in a list of thousands. Secondly, the memory that was being used to load a list of that size meant that performance was taking a big hit. The user and User Group selector is now in line with the Customer selector where it will first display a list of those users/User Groups that you have the most contact with (this is built up by default through general use of WEBcnx) and if the desired value isn't in that list, there is a built in search functionality that will allow you to find it.



## Create a new job

Subject \*

Due \* 04/05/2015 Evening

Assignee \*  User  User group

Requested By

Status

Priority

Designers  
Administrators  
Designers  
Lab Technicians

Medium Designers

A typical "My User Groups" list

## Create a new job

Subject \*

Due \* 04/05/2015 Evening

Assignee \*  User  User group

role

Search Cancel

Requested By

Status

Priority

Please select...  
Please select...  
Role - Admin - Report Creator  
Role - Admin - Report Viewer  
Role - Admin - Task Management  
Role - Admin - User Management

Searching for a User Group

## Users & User Groups

---

### User Group Types

User group types have been added. As many User Group types can be added as the administrator sees fit but the two system types that cannot be deleted are "Standard" and "Customer". The introduction of these types provides administrators with a method of linking like User Groups, whilst still allowing them to be separate entities. It also adds another layer of identification to User Groups, so users can quickly identify the role they play within the system.

### User Group Type Access Rights

It is now possible to define an Access Right so that it can set permissions for a whole User Group type. This is exceptionally useful for situations where the user needs to prevent a wide range of users from accessing something. Such as hiding a certain report from all Customer type User groups.

### User Statuses

The Active property of users has been changed from a simple Boolean to a new Status property with one of three values:

- Active- As if the old Active property was true.
- Inactive- Would appear as Customer Contacts but would be unable to log into WEBcnx. Also, does not appear in User dropdown lists.
- Archived- Would not appear as Customer Contacts, would be unable to log into WEBcnx and would not appear in dropdown lists.

### Setting a User's status from within the User Profile

## User Specific Database Windows

It is now possible to define database windows for information retrieved from the USERS table, this allows for stricter controls to be placed on the display of User information within WEBcnx as it means different sections of information can be exposed for different users. For instance, you may want to allow a User group the ability to view other user profiles but still keep sensitive information such as "Login Id" hidden.

## Expanded User Notification Rules

A new notification rule has been added which will inform users when the due date of an item has been changed. This can be assigned in the same way as all other notification rules and is available for:

- Items assigned to me
- Items requested by me
- Items subscribed by me
- Jobs subscribed by me

## User/User Group Task Templates

Task templates can now be defined at both user and user group levels as well as the customer level. This ensures that data can be pre-populated for all levels of users to make the completion of tasks as swift as they can possibly be. With task templates now being definable at multiple locations, it is possible for conflicts to occur. In the case that there is a conflict the task templates take the following precedence: Customer>User>User Group. This shows that customer templates will always be considered the most important whilst an individually configured user template will be prioritised over those defined for a User Group.



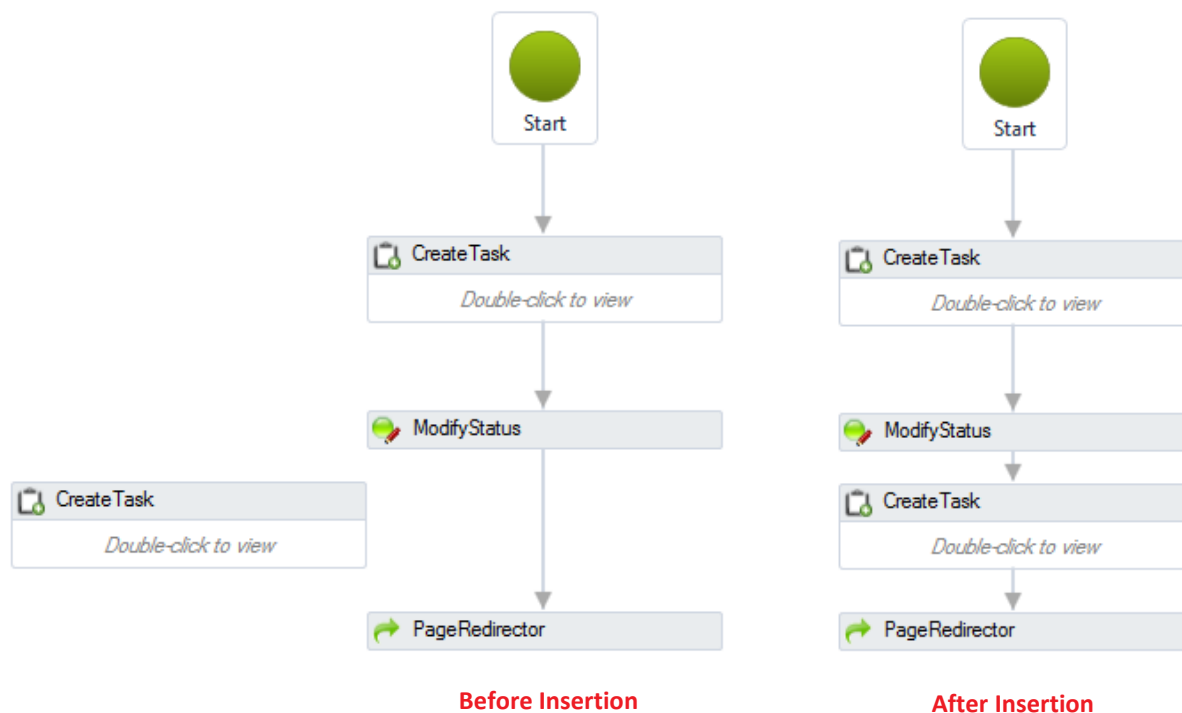
## Primary User Groups

Previously, the only way to define something such as a database window for all members of a user group was to go into each user's profile and set it individually. It is now possible to define this at User Group level and the change will automatically be applied to all users in that User Group. Saving much time and effort. However, as a user can belong to many User Groups, it is possible for conflicts to occur when it comes to deciding which one to apply. In order to prevent this, the concept of a Primary User Group has been introduced, this will ensure that if any conflicts are detected, WEBcnx will take the setting that is associated with that user's Primary User Group and apply it.

## Workflow Automation

### New Workflow Designer Features

It is now possible to insert new or unconnected activities into existing connections. Doing so has the effect of breaking the connection and inserting the new activity between the two activities that were previously directly connected.



Other functionality that is also now supported is as follows:

- Automatic connections- Introduces auto-connect points so that when an activity is dropped on an activities auto-connect point both the activity and the link are added. Previously, all links had to be added manually.
- Annotations- To facilitate developing larger workflows, the designer now supports adding annotations to help keep track of the design process. Annotations can be added to activities, states, flowchart nodes, variables and arguments.
- Panning- It is also possible to enter pan mode when viewing the workflow. This mode can be activated by selecting it (located at the bottom of the screen under the workflow), pressing the "space" key or holding the middle mouse button.

- Rubber band selection- Multiple activities can be selected at one time, either by dragging a rectangle around them (when pan mode is not enabled), or by holding down Ctrl and click on the desired activities one by one. Multiple activity sections can also be dragged and dropped within the designer and can also be interacted with using the context menu.
- It is now also possible to change the “DisplayName” value of the “Flow Decision” and “Flow Switch” activities.

## New Workflow Methods

Methods have also been added to give users the flexibility of locating a user or User Group by their Id, as the only previous methods were by loginId or name. The Id is what the ‘WEBcnx User’ and ‘WEBcnx User Group’ custom fields store and users are now able to pass this Id into one of these new methods and return a User or User Group.

## Workflow Created Tasks Modifiable during Creation

Changes have been made to the order in which tasks are created within workflow, as there were some use cases that involved modifying and value mapping data at the point of task creation, where the current method was unsuitable. When a task is created it is first created in a draft state and executes any “child” activities. Once those activities have executed the task is either published or left in a draft state. New “child” activities have been added that initialise the properties required for a “PerformValueMapping” and “ModifyCustomField” activity. Also, the “New Task” property, which can be used to specify a task to modify, is now initialised before any child activities are executed, making it available to the “child” activities.

## Architectural Changes

---

### WEBcnx 64-bit\*

WEBcnx can now be run in both 32-bit and 64-bit. When WEBcnx is running in 32-bit mode under IIS then it is restricted to using around 2GB of memory. This limit is quickly hit when many clients are using WEBcnx at the same time. Now that it can be run as a 64-bit application it can consume (in theory) up to 8TB of memory, which is quite a substantial improvement. In order to run WEBcnx as a 64-bit application, the server that is hosting WEBcnx must be running a 64-bit operating system.

### Windows Admin Tool\*

WEBcnx V4 also brings with it a separate admin tool that is run as a Windows application. The main benefit of doing this is that moving administrative tools to the Windows application should provide a big performance boost for WEBcnx sites as the admin area is the largest single area of WEBcnx and removing something that is used by a relatively small percentage of administrators will make the site much more lightweight for all other users. Also, moving all the admin tasks to an offline application should see their performance improve dramatically as it is a small application that’s performance is not reliant on internet speeds. Finally, this also improves the security of WEBcnx, as those users that need to carry out administrative tasks can only do so by being given the installers for the Admin application.

As things stand, all Administrative tasks will still be available in WEBcnx V4. However, the ultimate aim (once they have all been implemented into the application), is to remove the large majority of them. Some features, such as being able to view the Server Log, will remain as it has been



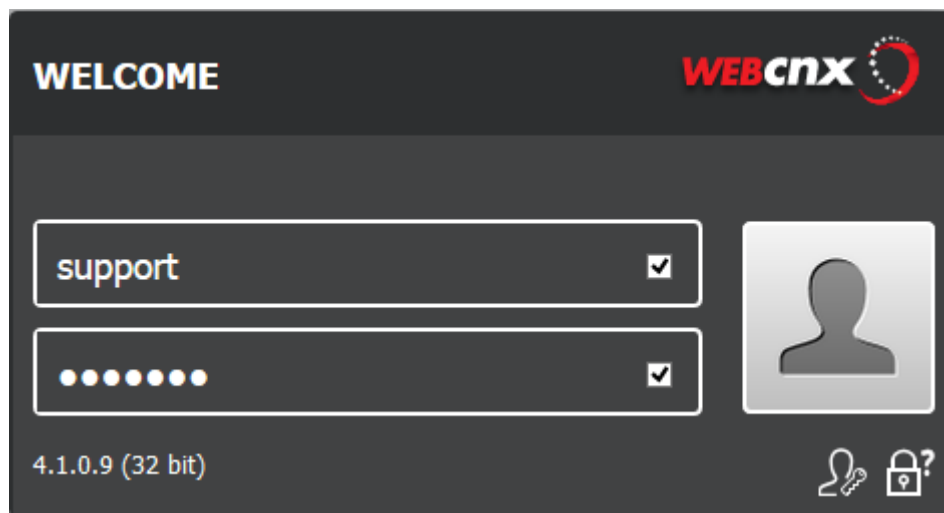
recognised there are some administrative features that will still be useful to access from within the site.

## Login/Logout

---

### Improved Login Page

The login page had received a facelift in order to fit the style of WEBcnx V4. There has also been the introduction of a User Avatar which will display once a valid username has been entered (a check is performed on whether or not the username is valid whenever the user stops typing). The avatar can support both static images and .gif files, allowing users to have an animated avatar if they wish. Other notable changes include the inclusion of the version number and whether the site is running in 32-bit or 64-bit underneath the password field. The icons for Domain Login and forgotten passwords have also been restyled.



The new WEBcnx login page

### New User Inactivity Handler

The way that WEBcnx detects inactive users has also changed. Previously, WEBcnx would only check whether a User was inactive or not when a server request was made. This means that inactive users could still use some elements on a page, such as completing a form, and would only be disconnected once they made a server request like attempting to save the form. This particular example was obviously quite frustrating for some users. Now, a timer has been implemented that tracks the amount of time that a User has been inactive for. If a user exceeds the amount of inactivity defined in their sites configuration, they will be automatically redirected to the login page.

## Miscellaneous

---

### Online User Help Guide

With the launch of WEBcnx V4 will come an online help guide which extensively covers every area of WEBcnx, providing users of all skill levels and experience with useful information and articles which will help them to understand WEBcnx in more detail. The guides range from “Getting Started” and

outlining some of the basic concepts of WEBcnx to in-depth Feature References and System Administration sections. There is also a knowledgebase in there where support engineers will regularly post troubleshooting articles and FAQs in response to any issues that are encountered by users.

## Performance Improvements

Great strides have been made with the latest version of WEBcnx to provide a faster and more responsive experience for our users. Users will notice much quicker and fewer page loads due to the use of modal dialogs and load on demand data. Furthermore, many of the search algorithms used in WEBcnx have been revisited and have been made much faster and more efficient meaning that results from searches are returned in a fraction of the time taken in previous versions.







ARDEN SOFTWARE

---

**Arden Software Limited**

Shepley Lane Industrial Estate,  
Hawk Green, Marple,  
Stockport, SK6 7JW,  
United Kingdom.

Tel. +44 (0)161 449 6600

Fax. +44 (0)161 449 9436

Email. [info@ardensoftware.com](mailto:info@ardensoftware.com)