What's New in infoRouter Version 8.0

Release Notes
February 10, 2009

Summary of Changes:

This new version of infoRouter introduces a vastly improved workflow module. Most of the improvements and enhancements in this release have been related to workflow and tasks. Although changes have been implemented throughout the system, the main focus has been around workflow and tasks.

A series of parameters that can be set when defining tasks has made the task creation and workflow definitions more powerful than ever.

Highlights of New & Improved features:

New and Improved User Interface:

The user interface has been streamlined to introduce navigational improvements.

A new set of descriptive icons and artwork has been introduced.

New Stand-Alone Module - Import/Export Tool

This tool has been introduced to replace the WebDAV interface and provides a controlled environment to upload and download documents from client workstations. Support for WebDAV still continues to exist.

Web Services API Enhancements

Additional API methods not previously offered.

Maintenance & Administration

Additional Web.config parameters introduced to provide better application control

Improved Help System

The Help System has been streamlined to include presentations, videos and how-to guides. This section has now been completely redesigned to allow for rapid improvements through the Live Update process.

Document Tagging

Document tagging allows users to tag documents with a label. This tag gets applied to the current version of the document and can later be used to determine the state of the document at a point in time.

New & Improved Features by section:

Workflow in previous releases:

In previous releases, the workflow system consisted of a series of serial tasks. Each step contained a single task that must be completed by one or more users. The only option for these users was to either "Approve" or "Reject" the document. An "Approve" vote advanced the document to the next step whereas a "Reject" vote simply ended the flow.
Once a document was submitted to a flow, all edits to the document were restricted until the document was either approved or rejected.

Introducing the new workflow:

Steps:
Virtually unlimited number of steps can be created to form the framework of a workflow process.

Each step in a workflow can now group together a number of tasks. Unlike previous versions, tasks in a given step may be different tasks assigned to different individuals.

So, when a step includes more than one task, it is treated as a parallel step. All tasks defined on the step are executed at the same time making these tasks (parallel) independent of one another. When all tasks on the step are completed, the execution of the workflow advances to the next step.

Tasks:
The task structure in Version 8.0 of infoRouter has been vastly improved to include multiple parameters. These parameters allow workflow designers to define the requirements of the task by simply selecting from a list of checkboxes.
Therefore, designers can make sure that a series of tasks are performed before a single task can be completed.

Task Requirements:
> *Edit*
>> Requires the task assignee to edit the document
>
> *Read*
>> Requires the task assignee to read the document
>
> *Comment*
>> Requires the task assignee to provide a comment
>
> *Approve reject*
>> Requires the task assignee to cast a vote of "Approve" or "Reject"
>
> *ISO review*
>> Requires the task assignee to provide comments related to ISO
>
> *SOX Review*
>> Requires the task assignee to provide comments related to SOX
>
> *Classification Downgrade*
>> Requires the task assignee to downgrade the classification level
>
> *Declassification*
>> Requires the task assignee to declassify the document
>
> *Archive*
>> Requires the task assignee to archive the document

Task Permissions:
> *Edit*
>> This setting allows a user to edit a document in workflow
>
> *Postpone*
>> This setting allows a user to postpone the task beyond its due date
>
> *Change Priority*
>> This setting allows a user to change the priority of a task
>
> *Change Finish date*
>> This setting allows a user to change the finish date of a task.
>>> *Used in cases where a task may be finished but the user can complete the task using a prior date*.

Edit Next step

This setting allows a user to edit the next step of a workflow.

Used in cases where a user may decide that the next step should be performed by another user

Edit all steps

This setting allows a user to edit all the subsequent steps in a workflow.

Used in cases where a user may decide that the subsequent steps of a workflow must be handled by a different team of users or the priority of the subsequent tasks must be changed.

Task permissions determine what actions a task assignee may or may not do during the task. It does not require that these allowed actions are taken. If an action is required, this must first be defined in the requirements section and allowed in the permissions section.

Ad-hoc Tasks:

A task assignee may create Ad-hoc tasks when performing a task. This allows task assignees to spawn additional tasks top others before a task can be fully completed. This brings about a new level control and flexibility to all kinds of business cases.
Example: When a user is assigned the task of reviewing a document, the task assignee may decide that another subject matter expert also contribute to the decision making process.

Task Distribution:

Prior to Version 8.0, tasks assigned to multiple users and marked with the "One vote is enough" parameter would produce multiple tasks. As soon as one user performed the task, other tasks would be dropped. This caused users to work on tasks that other users were also working on and caused multiple users to work on a task when only one users work was required.

Version 8.0 introduces a new method to handle multiple assignments when only one user's work is required. When the task is created, the current workload of all the selected users are examined and a user is automatically selected based on an algorithm that considers many factors. Users who are away (sick, holiday etc) are automatically taken out of the pool of available users and a selection is made from all remaining users.

Task redirection:

Users who are out sick or away on scheduled vacations can mark themselves "away" by indicating the days they will be unavailable. This is done in their "My Profile" section.

Reassignments:

A task assignee may decide that the task should be assigned to another user. The new version allows a task assignee to reassign a task to another user. Reassignment of tasks can also be performed by the Library Managers, the system administrator (SYSADMIN) and the task supervisors.

Document Edits:
A task may allow the editing of the main document. This is a major improvement in the new version. This allows a document to be edited multiple times during the workflow cycle as long as the task allows this to happen.

Document Attachments:
A task assignee may attach documents to the main document. There are many cases of workflow scenarios where each task assignee may process a main document and add their own documents ending up with a series of documents as a result of the workflow.

Library Policies

Library Policies:
The library policies function has been vastly improved to include additional policy parameters.