<u>ECi Software Solutions Digital Taskforce V8.3a Notes November 2014</u>

(Covering All New Developments & Corrections Since v7.9)

Please Note:

Before installing version 8.3, please note the following:

Install "Instant Message Alerts" Component <u>First</u>

Before installing Digital Taskforce, you must first run the IM.msi installation that was included along with this installation in the downloaded zip file. This Digital Taskforce installation relies on libraries and other support files contained in IM.msi in order to install correctly.

Do <u>Not</u> Install in the "Program Files" Folder

If you are installing on Windows 8, Windows Server 2012, Windows 2008, Windows 7 or Vista, do not installing in the 'Program Files' location. This is due to increased Windows security around this folder. Please choose another non-system location on a local hard drive for the Digital Taskforce installation.

Request a Version 8 License Code

If you are upgrading from an earlier version of Digital Taskforce to V8.0 or above, you will need to obtain a new license code from ECi Software Solutions. Your existing (pre-V8.0) license code will not work with V8.0 or above installations of Digital Taskforce.

Crystal Reports Version 11 Runtime Engine

This installation of Digital Taskforce will place the Version 11 Crystal Reports "runtime" files onto the computer you are installing Digital Taskforce on. This may cause earlier versions of Crystal Products (on this server) to function improperly or not at all. You may be required to upgrade your other Crystal products to Version 11 in order to use them after this installation is completed.

No Default SMTP Engine; Authentication & SSL Fully Supported

The SMTP engine optionally installed in version V7.4 through V7.9c of Digital Taskforce is no longer included with Digital Taskforce and is no longer supported by ECi Software Solutions. Both inbound and outbound email authentication is now supported in Digital Taskforce with full SSL (secure sockets layer) support.

Enhancements & Fix Summary:

The following pages list the enhancements and program fixes made to Digital Taskforce from version 7.9a through version 8.3a. Please note that the Digital Taskforce manual has also been updated to be compliant with version 8.3. If you have any further questions about any of the items detailed in this document, please contact e-automate Customer Care.

Version 7.9a

- (**Authentication/SSL on Outgoing Email**) Support for TLS via SSL for outbound email is now supported. Using the /TLS switch in the email account description allows outbound email messages to start on port 25 then switch to a secure port during SSL transmissions. Some online service providers require this type of communication.

- (**Added "Null" Support on Triggered Items**) Null values for triggered items now resolve to a single space and will trigger once only.

- ("**Every Minute" Scheduling**) Under certain system conditions, an "every minute" scheduled event would reschedule the same event and result in duplicate alerts. This has been corrected.

Version.7.9b

- (**Service Restart After Reboot**) On some systems after a reboot, the Digital Taskforce Windows service would not restart even though the service was set to automatic. This has been corrected.

- (**Additional International Date/Time Support**) Under some circumstances, regional date/time settings would retrigger previously-triggered events. Support for these formats has been added.

- (**Minute '59' Event Scheduling**) For some schedules, they would erroneously run at minute 59 of the hour, causing events to run an additional time. This has been corrected.

- (**New Schedules > 60 Minutes**) The scheduler now supports "every 'x' minutes" frequencies greater than 60 minutes.

Version 7.9c

- (**150+ Events Run Skipping**) Schedules with single run frequencies would sometimes be skipped when more than 150 events were active and scheduled to run. This has been corrected.

Version 8.0

- (**Instant Message Alerts**) IM (instant message) is now a supported alerts delivery method. Supported IM technologies include:

  - Microsoft Live Messenger
  - Google Talk
  - ICQ
  - Yahoo! Messenger

- (**Twitter Alerts**) The ability to send alerts via Twitter (via "tweets") is now a supported alert delivery method. Twitter alerts are configured using the 'Actions' tab for an event; note that a client must own the full-function edition of Digital Taskforce or the "Actions" module in order to use this functionality.

- (**New Eventpaks Released**)

  - Sage 100 ERP (revised & expanded)

      o   Sage 300 ERP (revised & expanded)
      o   Sage 500 ERP (revised & expanded)
      o   WeSuite CRM

Version.8.0a

- (**Instant Messaging Under SQL Server**) Clients upgrading Digital Taskforce to SQL Server sometimes lacked required tables for IM alerts. This has been corrected.

- (**Auto-Refresh on Track Tab**) Tracked (triggered) events did not auto-refresh when a user clicked on the "Tracking" tab of an event. This has been added to the system.

- (**Evaluation Server Name Auto-Load**) Lowercase computer server names were not being automatically licensed for client evaluation. This has been added to the system.

- (**New Eventpaks Released**)

  - CYMA (ERP)
  - Sage CRM
  - Sugar CRM

Version.8.0b

- (**Minute Schedules Running at Midnight**) Events that used an "every 'x' minutes" schedule that exceeded every 60 minutes would sometimes be scheduled to run at midnight even though the allocated hours did not include midnight. This has been corrected.

- (**Some Subscribers Hidden in V8.0**) There was a display problem in version 8 that caused some subscribers to be invisible for maintenance. This has been corrected.

- (**Alerts Via IM**) Sometimes when first time adding a subscriber to an event and checking the IM (instant message) delivery type, the IM selection was not being saved. This has been corrected.

- (**New Eventpak Released**)

  - Technisoft Service Manager

Version 8.1 / 8.1a

- (**Multi-Tenancy (Saas/Cloud) Support**) Digital Taskforce now supports SaaS/Cloud implementations; this allows a single installation of Digital Taskforce to be used (shared) by multiple customers, while not allowing any one client to see any other clients' data.

- (**Application-Level Security**) It is now possible to control which Digital Taskforce users have access to different "applications" that are configured in the Event Manager. This allows you to implement monitoring of sensitive (e.g., payroll) data while controlling which users can see and configure the queries and events for that sensitive data.

- (**DCOM Communications Eliminated**) The Digital Taskforce Windows Service (and the individual server "threads") have been updated so that they no longer communicate via DCOM, thus eliminating any DCOM compatibility or configuration issues.

- (**Windows Service Stop/Start Improvements**) The Digital Taskforce Windows Service has been improved to provide greater control over stop/start commands as well as its auto-restart capability.

- (**Event Scheduler Streamlining**) The Digital Taskforce "scheduler" process has been upgraded to provide faster throughput & handling of large volume events.

- (**HTML V3.2 & V4.0 Support**) Support for versions 3.2 and 4.0 of HTML are now supported when outputting Crystal reports in HTML format.

- (**Crystal Image File Attachment to Email**) Reports that include associated images now have their images automatically optimized and attached to all corresponding email deliveries.

- (**Crystal Image File Link to Dashboard**) Dashboard (webcast) alerts that include associated images now have their images automatically optimized and linked to the corresponding HTML page.

- (**Minute Schedules First-Time Run**) Events that had minute schedules would sometimes execute twice on their first run. This has been corrected.

Version 8.1b

- (**Copy/FTP Locations Expanded**) The specified locations for reports and charts that get delivered via the "copy" (FTP) delivery method has been increased to allow for up to 255 characters.

- (**User Access Rights Upon Deletion**) When a user was deleted from the Digital Taskforce database, their access rights remained in the system. This has been corrected.

- (**New Eventpak Released**)

  o   Orchid (Inventory Management)

Version 8.1c

- (**Email Format With Reports**) Events that triggered email alerts with attached (or embedded) reports would sometimes be formatted incorrectly. This has been corrected.

- (**Blank Emails When Low Hardware Resources**) During severe low system resources, an email with a blank subject and message could be generated and queued for delivery. This has been corrected.

- (**New Eventpak Released**)

  o   Sage ERP X3

Version 8.1d

- (**Low Resource Record-Locking Check**) An automatic process to check for and bypass record locks on heavily loaded systems (systems with low hardware resources) was added.

- (**Instant Message Server High Availability**) A failover procedure was added to ensure high availability for the IM server, ensuring that pending IM alerts do not stack up.

- (**New Eventpak Released**)

    o Smart Hotel (Hotel Management)

Version 8.1e

- (**Added Support for MS Azure (MS Cloud) Environment**) Digital Taskforce was enhanced to support Microsoft's cloud platform, MS Azure.

- (**Orphan Alert Record Handling**) Due to system maintenance while events are running, "orphan" alert records can sometimes be created. An automated procedure was created to identify orphan records and process them accordingly.

- (**New Eventpaks Released**)

    o ECi M1 (ERP)
    o Ascent (Customer Service)
    o Sage HRMS
    o ACCTivate (ERP)

Version 8.2

- (**Redesigned Navigator Module User Interface**) The Navigator module had its UI completely re-written so as to make better use of screen space, and to add access to all the items that are typically used in the original Event Manager interface.

- (**New "Graphic Alerts" Module Added**) This module allows for the create of graphic alerts – charts and graphs that visually represent data associated with the event being triggered. Supported graph & chart types include:

    o Bar chart
    o Pie chart
    o Line chart
    o Area chart
    o Cone chart
    o Donut chart
    o Funnel chart
    o Pyramid chart

- (**Comparative Performance Charting Added**) This is the ability to create charts (such as bar, line, and area charts) that show the comparative performance of multiple records over a period of time,

such as sales per month, by item and salesperson, and so on.

- ■ (**Dynamic – Parameter-Driven – Charts**) This is the ability to pass query values into charts dynamically, based on current business conditions. For example, an event may identify reps whose pipeline is less than $20,000 and then Digital Taskforce could generate a pipeline analysis funnel chart for each rep that meets this event's criteria.

- ■ (**Migration to MS Azure**) A new migration module for clients running under MS Access allows them to migrate their data to the MS Azure cloud environment.

- ■ (**MS Azure Timeout Handling**) There was an issue with Digital Taskforce timing-out when running under the MS Azure cloud. This issue has been corrected.

- ■ (**Job Stream Event Submission Timing**) There was an issue where multiple events in a job stream were not always waiting for the preceding jobs to finish processing before the current job in the stream was executed. This has been corrected.

- ■ (**New Eventpaks Released**)

  - o Sage 100 ERP "Chartpak"
  - o Sage 300 ERP "Chartpak"
  - o Sage 500 ERP "Chartpak"

Version 8.2a

- ■ (**Chart Display Issue**) There was an issue where a chart would display an incorrect number of matching records based on query results. This has been corrected.

- ■ (**New Eventpaks Released**)

  - o Sage 300 ERP (revised & expanded)
  - o SalesLogix (CRM)

Version 8.2b

- ■ (**Copy & Paste Added to Query Preview Tab**) A new grid was put into place for the query "preview" function – this enables the use of "copy" and "paste" functions from this grid.

- ■ (**Added Support for MS Exchange Online Email**) Added support for "Outlook 365" (also known as "Exchange Online"). Also added "Exchange Online" default configuration button to simply email configuration.

- ■ (**Navigator "Exception" & "In Progress" Windows Scaled Down**) Adjusted the size of the Navigator event "Exceptions" and "In Progress" boxes to match smaller size in the rest of the Navigator UI.

- ■ (**Versioning Fix For Scheduler**) The "scheduler" module was showing the wrong version number. This has been corrected.

- ■ (**New Eventpaks Released**)

  - o Sage 100 ERP Dashboards
  - o Syspro (ERP)

Version 8.2c

- ■ (**Enhanced System Performance**) The maximum number of concurrent queries capable of being executed by the system increased from 11 to 33, greatly expediting system processing.

- ■ (**Chart Editing Sequence Fix**) Editing a query associated with a chart sometimes retained old data. This has been corrected.

- ■ (**New Eventpaks Released**)

  - o SuperOffice (CRM)
  - o Sage 100 Contractor

Version 8.2d

- ■ (**Undefined Cursor in Query Preview**) The default cursor setting when previewing a query was undefined. This has been corrected to use the default ODBC setting.

- ■ (**New Eventpak Released**)

  - o EBS Paysuite (HR)

Version 8.2e

- ■ (**Windows Version 8 Display Compatibility**) On some Windows 8 machines there was a display problem when showing a list of items in "tree view". This has been corrected.

- ■ (**Missing Chart Parameters**) The installation of some of the new Charts & Graphs EventPaks were missing parameters. This has been corrected.

- ■ (**Chart Module Minor Corrections**) Various minor corrections in the Chart & Graph design module.

Version 8.2f

- ■ (**Expanded Stored Procedure Use in Queries**) Stored procedures can now be used in queries to support record grouping and breaking, as well as include the data from "memo" (expanded content) data fields.

- ■ (**New Eventpak Released**)

  - o Sage 100 ERP (Automated Trend Analysis)

Version 8.2g

- (**Optimized Display of Providex Data in Queries**) When Providex data is retrieved by queries, "look-ahead" mode is enabled so that record sorting & breaking is supported on all data fields.

- (**Last Day of Month Schedule Fix**) Events that were scheduled to run on the last day of a month were not always running on the correct date. This has been corrected.

- (**Windows 8 "Tree View" Compatibility**) On Windows 8 (and any similar machines) Digital Taskforce now provides the required 'OCX' "tree view" file if it is missing from the Windows installation.

Version 8.3

- (**Ability to Update ACT! Databases**) The ability to configure events that update an ACT! database is now supported.

- (**Additional Excel Export Options**)   Additional options regarding exporting Crystal reports in Excel format. See latest Crystal Reports documentation for details.

- (**New Eventpaks Released**)

    o   Sage 300 ERP (Automated Trend Analysis)
    o   Sage 500 ERP (Automated Trend Analysis)

Version 8.3a

- (**Navigator "Un-clickable" Branch Fix**) The occasional issue where the Navigator module would lose the ability to right-click or double-click on certain branches has been corrected.

- (**Added Holiday Handling to Job Streams**) Job streams now have the option to run or not run on days that are indicated as holidays.

- (**Multi-Company "Changed Value" Tracking**) Solutions such as ERP where multiple companies can be configured now allow for "unique" stamping of each company's records so that "changed value" tracking can be accomplished for multiple companies.

- (**Password Protection Added to Command-Line Submissions**) Events that are submitted from the command line or external applications now support the use of password protected usernames.

- (**Changed-Value Tracking Supports Single-Quote Values**) Events that monitored for changed values were not able to identify changes in fields that contained a single-quote character. This limitation has been removed.