



December 13, 2013

This user bulletin describes changes made to this release of GoFileRoom.®

CHANGES

Microsoft Windows XP support discontinued

Microsoft is ending support for the Windows XP operating system in April of 2014. Therefore, WorkFlow Tools will begin a phased approach to end support of Windows XP. Beginning in April 2014, we will no longer design or develop features specific to the Windows XP operating system and we will no longer perform in-house testing of the Windows XP operating system.

We will communicate any additional information during our upcoming releases.

Platform

- With this release, we have enabled the Status list in the **Tasks by Status (Serial and Parallel workflows only)** gadget and the **WorkFlow Task Summary (Serial and Parallel workflows only)** gadget to appear automatically. You can now include the Status list as part of your search criteria when searching for tasks in these gadgets.
- From within My Work, you can now add a document from the Documents tab in the Task Properties dialog. To add a document, click Add Document to open the Add Document dialog, in which you can save a document to the workflow.
- This release of GoFileRoom resolves an issue with selecting “Overdue” from the Due list within WorkFlow Manager gadgets. Prior to this release, if you selected “Overdue” from the Due list from within the **Tasks by Status (Serial and Parallel workflows only)** gadget or the **WorkFlow Task Summary (Serial and Parallel workflows only)** gadget, the results included only those items that met the “Not Completed” status.
- From within My Work, you can now select the Multi-Select option from the Actions menu to update multiple tasks with identical names.

Known issue

You may receive the “An error has occurred. Please refresh your browser” error message when searching within My Work for “All” users. We are currently working to resolve this issue.

FileRoom

With this release of GoFileRoom, we've added QuickLaunch commands to the ControlPanel task bar menu that you can use to launch single or multiple sessions of the WorkFlow Manager Document Browser or the WorkFlow Manager WorkFlow browser.

To launch the Workflow Manager Document Browser or Workflow Browser from the FileRoom ControlPanel add-in, follow these steps.

1. Choose Start > All Programs > Thomson Reuters > FileRoom and click FileRoom ControlPanel.
2. Enter your login credentials. The FileRoom ControlPanel icon will appear in your workstation's desktop task bar.
3. Right-click the FileRoom ControlPanel icon and choose **Search for Documents** or **Search for Workflows** from the context menu.

FileRoom 8.1 Add-Ins

- With this release, we have resolved an issue in which an "Error setting dialogue" error message appeared when clicking OK in the ControlPanel Add-In Indexing Window. The issue was specific to certain drawers.
- Prior to this release, FileRoom and DataFlow Add-In users received multiple warning messages such as "This workbook contains links that are not supported in FileRoom" when adding or editing Microsoft Excel documents that contained DataFlow functions. This issue has been resolved with this release of GoFileRoom.
- Prior to this release, the "Error editing document" message appeared when editing Microsoft Excel and Microsoft Word files after users installed the FileRoom Add-In. This issue has been resolved with this release.

Important! Before you install the latest FileRoom Add-Ins, you must uninstall the previous Add-In versions. To do so, choose Start > ControlPanel, and click Programs and Features. Then, right-click the FileRoom Add-Ins one at a time and choose Uninstall for each Add-In that you plan to update.

WorkFlow Manager

- In WorkFlow Manager, administrators can add custom fields to folders and workflows. These fields appear as folder properties or as workflow properties in your workflows. With this release, data that you enter for a workflow custom field will automatically roll forward. You can select new values for folder-level custom fields in the Roll Forward Wizard. Administrators can now control whether or not the workflow custom field data that is associated with the current workflow will roll forward.

To roll custom fields forward, select an item in the grid and click within the Roll Forward column and click Yes to copy the existing data to the new workflow or click No to leave the new workflow field blank. You can roll the User drop-down list, General Text, and Date fields forward.

Note: We have also added the Default roll forward option for drop-down custom fields. This option allows the administrator to use the "Default" value designated for the specific custom field. For example, if "New York City, New York" is the default setting for the **Office Location** field, this default value will be used for the new workflow when you choose to copy the existing data to the new workflow.

- With this release, administrators can prevent users from customizing the roll-forward settings when a roll-forward process is initiated. To do so, click Setup in the navigation pan, select WorkFlows, and select Configuration. When the WorkFlow Configuration page appears, mark the **Prevent Override of Custom Field Roll Forward Settings** checkbox.

When this checkbox is marked, users will not be able to customize the roll forward settings when a roll forward process is initiated. The roll forward will be processed using the default specified by the administrators.

WorkFlow Manager (cont.)

- You can now view the default roll-forward settings added by the administrator when you perform a roll-forward process. You can now also override the settings if desired.

Note: Administrators can prevent users from overriding the default roll-forward settings, if desired.

- With this release, GoFileRoom will automatically save any changes that you made to the Delivery Instructions tab located in the workflow folder when you navigate away from the tab.
- You can now specify multiple values in the index drop-down type search fields on the Documents Search dialog.

This dialog appears after you click the Advanced Search link on the Documents tab of a workflow folder.

- You can now add a document to a task from inside the Documents tab of the Task Properties dialog.

Click Add Document to save a document to the workflow. You can now specify the document settings in the Add Document dialog that opens.

- With this release, when you import changes to update calendar events that are currently assigned to a workflow, data that you enter in the OWM W/F Process column will no longer change the workflow template currently assigned to the event.

Note: Some minor formatting changes are still pending as of this release.

- With this release, we have resolved an issue with the display of the vertical scroll bar. The vertical scroll bar will now appear in the workflow folder navigation window, as needed, to provide access to all of the workflows in the folder.

- Prior to this release, you could export only one page of records at a time from within the WorkFlow Browser. You can now export all records from the WorkFlow Browser using Export options in the Actions menu.

- With this release, you can use the Multi-Select option from the Actions menu to update multiple identical tasks from within My Work.

- This release resolves the following issues related to saving sort-order preferences in the WorkFlow Manager.

- When you sort by the Urgency column in My Work, the list now reflects the correct color-designated sort order of Overdue, Urgent, Medium, and Low.
- Sorting preferences that you configure for My Work are now retained after closing and re-opening dialogs.
- Sorting preferences that you configure within the Description column of the WorkFlow Manager Documents screen are now retained.

- With this release, we have resolved an issue within the Document Browser and on the Documents tab of a workflow folder in which the Email Using Outlook > Native Format option was not displayed in the Actions menu when selecting documents in a drawer in which the Secure PDF option disabled.

Calendar

- With this release of GoFileRoom, we have modified the way that the system identifies dates in Calendar import templates, as well as within Setup and Scheduled Event export files. Going forward, Calendar will now categorize all dates as Date fields instead of General fields, and will automatically adjust the dates to the date and time set by your operating system.
- With this release, the Calendar authority export process will now export the month and day of an authority's year-end as separate fields using the **Month of Authority Year End** and **Day of Authority Year End** fields.
- We have resolved an error in which users were prompted to enter a valid date in the Scheduled Event Profile window after entering lead days.