



enate
SIMPLIFIED SERVICE AUTOMATION

V2019.3.5.0

Release Date – 13th November 2019

Enate Limited

info@enate.net

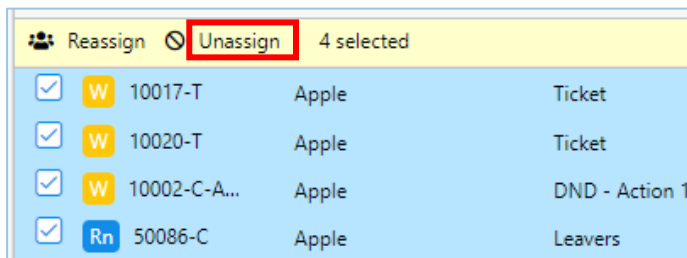
www.enate.net

1. Work Manager Changes

This section details the changes / new features in v2019.3 that can be found in the Work Manager operations environment.

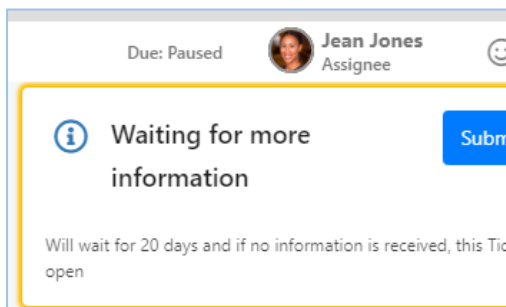
1.1 Bulk Unassign

In addition to being able to assign items in bulk from grids, you can now select to bulk *unassign* multiple work items.



This unassigns the work items, which then become available for users to Pick up from their work Queue. Users no longer need to navigate into the individual work item in order to unassign.

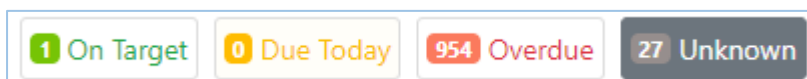
1.2 Stopping the clock on Work Items in a state of Pause



As of v2019.3, if a work item is in a state of Pause then the Due Date is no longer displayed (AND the Due Date rule configured in Builder is set to 'Add wait time to due date'), then the system does not display the due date in the header ribbon. Instead, we show 'Due: Paused'. In a future release the system will also show the time remaining when the item was placed into a paused state.

1.3 Additional Due Date Status – 'Unknown'

A fourth status has been added to the previous 'Red Amber Green' breakout of works items against their Due Date, that of 'Unknown'.

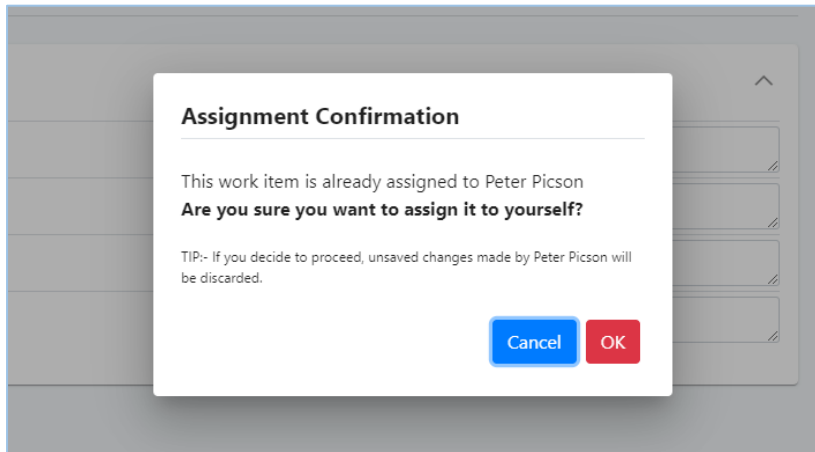


Work Items are classified into a state of Unknown when the Due Date is not currently known. This can be in the following situations:

- When the work item has just been started (manually) but has not yet been submitted.
- When the work item is in a state of 'Paused – Wait for more Info' AND is set to add the wait time on the Due Date.

1.4 Alerting users when work is assigned to someone else

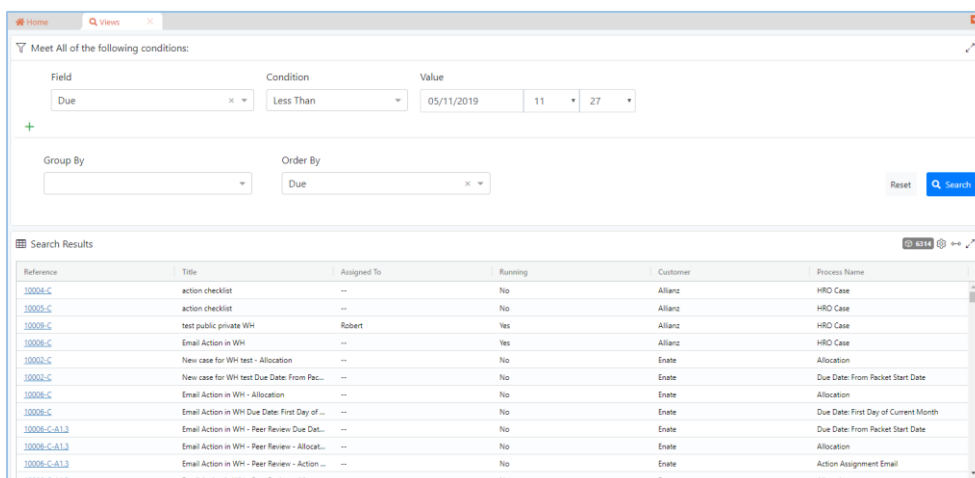
If you open an unassigned work item and subsequently make a change which would result in it being auto-assigned to you, if during the interim period another user has opened the same work item and has already assigned to themselves, the system will display a warning popup explaining that if you assign the work to you, any unsaved changes from the other user will be lost.



You have the choice to continue with assigning the work to you (which will discard the other person's unsaved changes) or cancel your reassignment / update.

1.5 New Feature – Views of your data

The new 'Views' feature in Enate allows you to view work items in your business area (i.e. those which you have permissions on), specifying your own search criteria. You can search based upon a large number of standard bits of system information, e.g. 'Last Updated By', 'Queue', and by any of the Custom Data fields in your system.



Access the new 'Views' tab from the Navigation pane..

A. Searching

Add the search criteria you want to search by, setting the 'Condition' (e.g. Equals, Is greater than etc.), and a value against which to evaluate the condition.

Meet All of the following conditions:

Field	Condition	Value
Due x ▼	Equals ▼	22/10/2019 16 ▼ 00 ▼

+

By default the system sets an initial value of 'items due now'.

You can add as many additional sets of conditions as you wish.

Field	Condition	Value
Due x ▼	Equals ▼	22/10/2019 16 ▼ 00 ▼
Queue x ▼	Begins With ▼	Queue 2
Industry Type x ▼	Equals ▼	Software

+

B. Grouping and Ordering

You can Group By and Order By your results by all of these same criteria.

<p>Group By</p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Standard columns</p> <ul style="list-style-type: none"> Action Type Assigned To Contract Name Customer Due </div>	<p>Order By</p> <div style="border: 1px solid #ccc; padding: 2px;"> <p>Due x ▼</p> </div>
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Only a single grouping criteria can be specified, and results will be loaded upon expanding an individual group.

Search Results

Group	Reference	Title
> ACME		--
> Agricultural Bank of		--
▼ Allianz		--
	10004-C	action checklist
	10005-C	action checklist
	10006-C	Email Action in WH
	10009-C	test public private WH
	10007-T	new ticket created and close on IC
	10008-T	new ticket created and close on IC Updated
	10009-C-A1.1	test public private WH
	10010-C-A1.1	test public private WH

2. Builder Changes

This section details the v2019.3 changes which can be found in the Builder section of Enate.

2.1 Master Data access

The system now allows for a more granular granting of access levels to people who have access to Builder. These can all be found in the 'See More' section of the Edit User popup in Builder.

The new breakout is:

Builder

Can Access Builder
 Can Edit Shared Configuration
 Can Access User Management

- Can Access Builder: Allows access to Builder, with the following levels of configuration available:

Activities
Add/Edit Language translation
Add/Edit Contract
Add/Edit Service
Add/Edit Case/ticket into a service
Add/Edit Local checklist
Add/Edit Customer
Add/Edit Fixed Frequency Schedule
Add/Edit Schedule records
Set Live and retire

- Can Edit Shared Configuration: You will need this level of access if you also wish to modify core settings / shared data which can be used in multiple places. This will allow access to the follows levels of configuration:

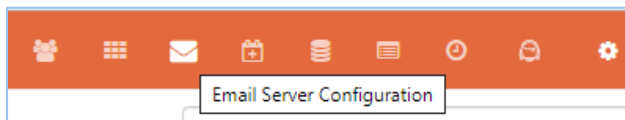
Activities
Add/Edit Service Line
Add/Edit Case/Ticket Archetype
Add/Edit Action type in global menu
Add/Edit/Clone of flavours i.e. Due date, allocation, Action general, Ticket follow up
Add/Edit Ticket Category Global List
Add/edit Global Checklist
Add/Edit Service provider
Add/Edit System Setting
Add/Edit Calendar
Add/Edit custom data and fields
Add/Edit Email settings* (*new in 2019.3)
Add/Edit Schedule Structure

- Can Access User Management: This allows access specifically to the User Management & RPA integration section.

2.2 New Email Configuration in Builder

IMPORTANT NOTE: As part of the upgrade process to v2019.3, ALL Email Input Channels (now called Email Connectors) will be switched off, to allow for manual verification that the migration of these has worked as desired. They can all be viewed in a single place, and manually switched back on, once checking has verified they are correct.

As of v2019.3, a number of changes have been made regarding confirmation of email server / input channel setting. To help support this, a new section has been added to Builder:

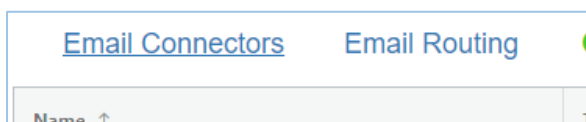


The following changes have been made:

- Terminology change: We will no longer refer to 'email input channels', instead we will now use 'Email Connectors'
- Configuration of this has now moved from the old Client Applications (Configuration Manager) to this new section in Builder.
- The previous approach of:
 - Creating Input Channels on a specific master process in Configuration Manager, then
 - Linking up those email addresses to specific Ticket instance configuration in Builder (e.g. specifying the incoming email address against a ticket category *within* the Ticket configuration itself).

Has now been changed to the following, more decoupled, approach.

Two sets of configuration are now carried out in Builder, split into to parts of this email configuration section:



- Email Connectors – Create your email connectors here (similar creating old email input channels, but not yet linked to a specific process).
- Email Routing – where to route incoming emails, i.e. Refercing the email addresses in the Connectors yo have created, you can specify which which Tickets or Cases should brand new emails into a certain inbox start.

By doing this you can setup and maintain how your Tickets and Cases run in conjunction with email servers, without having to modify the actual Ticket and Case processes all the time.

All configuration will be migrated over from the 'In-ticket' configuration to this new location as part of the upgrade.

A. Email Connectors - Detail

To add a new email connector click on the 'Add Email Connector' link at the top of the page. This will bring up the details page to configure & test the connection.

Add an Email Connector ✕

In order to test and enable this connection, all mandatory fields must be filled out. To save, at least a name and primary email address is required

<p>Email Service *</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Gmail (IMAP) ▼</div> <p>Username</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">sample@gmail.com</div> <p>Primary Email Address *</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">sample@gmail.com</div> <p>Use for * <input checked="" type="radio"/> Incoming <input type="radio"/> Outgoing <input type="radio"/> Both</p>	<p>Name *</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">HR Incoming Mailbox</div> <p>Password</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">.....</div> <p>Access another mailbox <input type="checkbox"/></p>
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[Open Connection Test](#)

Disabled ✕
Save
Cancel

B. Email Routing - Detail

Once you have some email connectors defined, you can reference them in email routing to specify where emails coming into each mailbox should be routed by Enate (i.e. which work items it should start).

Edit Email Routing ✕

Email Connector Name *

Kamal Gmail ▼

Email Address *

All

Specific

enate.kamal@gmail.com

Process *

Customer	Contract	Service	Process
ACME ▼	Global ▼	HRO ▼	HRO Case ▼

Enabled

Send Acknowledgement

Create Work For Test Mode

[Add Next](#)

Save
Cancel