

Release Notes

Version 01.11.08 (9/4/2015)

- **All.** Have added a diamond symbol \diamond on some tabs to indicate if the records are from another function in the system. Generally when a record is selected from one of the records on this tab, the system will branch to the other functional area.
- **Tasks.** Added further functionality. Subtasks are now separate records adding more robustness to the Subtask functionality. Subtasks can be moved from one Task to a different Task. Subtasks can now have Steps, which document the steps to be taken to complete a Subtask. Like Tasks and Subtasks, Steps are their own records. Added several new reports.
- **Documentation.** Numerous changes to the documentation to Tasks. Also rearranged the Admin Portal section.

Version 01.11.07 (8/24/2015)

- **Tasks.** Fixed lookup error.

Version 01.11.06 (8/23/2015)

- **my Contacts > Fast List.** Added a new quick notes field that can be cut and pasted anywhere. Great for musings on the fly.
- **Tasks.** Added further functionality. Tasks can now have Subtasks. Added status management. Created a view on Task progress.
- **Financials.** Added further color-coding for Non Billable Costs.
- **Security.** Added Level controls for Tasks.
- **Documentation.** No changes to the documentation.

Version 01.11.05 (8/06/2015)

- **Team Dashboard.** To further enhance team collaboration, there is a new team dashboard accessible from both the User and Admin portals. After selecting a team from the dropdown menu, the dashboard will show tabs for team related: Review Items, Interactions, Tasks, Reports and Documents. This will work whenever the team field is completed for one of these records.
- **Tasks (formerly: WBS).** We have enhanced the WBS functionality and re-purposed it as a new function called Tasks. Available from both the Admin and User portal, Tasks are work activities to be completed by one or more people or by a team. Tasks now have details, notes and status management. Tasks show in the new Team Dashboard. In addition, Tasks show in myActions (User Portal) if the person is the "Assigned To" person for the Task. With the enhancement and transition to Tasks, the WBS import function is no longer available.
- **Security.** We have enhanced access level controls giving more control on record changes, deletions, etc. - see Security Portal > Access Management > Levels.
- **Review Items.** The automatic creation of a Workflow now works properly.
- **Documentation.** No changes to the documentation.

Version 01.11.04 (7/02/2015)

- iPad Preview - now works by giving a PDF view of a report.
- No changes to the documentation.

Version 01.11.03 (6/14/2015)

- Minor changes.
- No changes to the documentation.

Version 01.11.02 (6/04/2015)

- Minor changes.
- No changes to the documentation.

Version 01.11 (5/29/2015)

- Documents now have the correct reports.
- Project documents - store 1,000's of documents and encrypt the ones you want to keep private.
- Sample data - we have added a complete set of sample data making it easier to explore the features.
- Contacts - new address fields support more address options for a person.
- Financial Portal - a new portal adds further controls on accessing financial data.
- Time Line Rates - new flags show whether a time line is missing rates or costs.
- No changes to the documentation.

Version 01.10 (5/21/2015)

- There is a new Financial Portal to enhance access control on financial details.
 - Project Financials and related reports have been moved to this portal.
 - The financial data for Project Positions have been moved to this portal.
 - Work Orders and Budget Lines have been moved to this portal.
- A new Documents functionality to store millions of documents replaces the Attachments functions.
- There are a number of interface changes to accommodate the iPad.

Version 1.0.0 (11/1/2014)

- Release version for Windows and Macintosh OS.