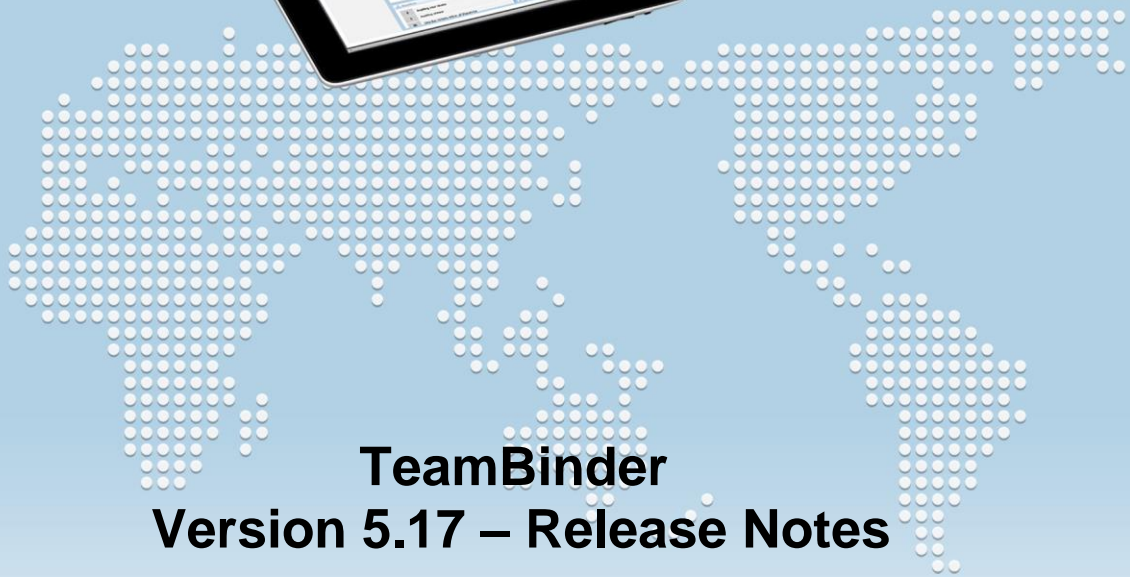




QA Software
TeamBinder



TeamBinder
Version 5.17 – Release Notes




Document: REL-TB-008-V5
Revision: 0
Last Updated: 23/06/2014

A. Enhancements in Version 5.17 of TeamBinder

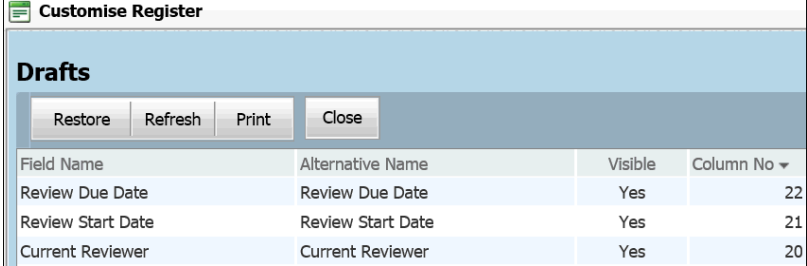
A number of new enhancements have been included in this mini release of TeamBinder. Some of the more beneficial are:

- A new graphical interface to create and manage review workflows.
- The ability to send Transmittals for Review in the same way that Mail can be sent for Review.
- A restructure of the Packages Module with a separate register for incoming Packages.

These significant new enhancements are described in more detail in separate sections of these release notes.

Main Menu / Issue	Sub Menu / Sub Issue	Description
General	Registers	A new Clear Selection option has been added to the bottom of all registers to very quickly de-select all currently selected items in the register.
	Folders	<p>It is now possible to very easily copy selected items from one folder to another folder.</p>  <p>New Copy, Cut and Remove buttons have been added to the Toolbars when viewing the contents of a folder from within the mail and document registers.</p> <p>With the folder view active, simple select one or more items within a folder in the grid and then use the Copy button on the Toolbar.</p> <p>Locate the folder to copy the items to and right click on it and select Paste.</p> <p>Use the Cut button to cut select items from one folder and copy them to another folder. The Remove button will remove selected items from a folder.</p> <p>Note that the copy option available via a right click on a folder is used to copy a folder to another folder. The contents of the folder are not copied.</p>
Mail	Attachments	<p>When viewing mail via the preview pane within any of the mail registers, there is now a link direct to the attachments on the far right of the preview pane header.</p>   <p>Also the attachments icon in the mail register to the left of each mail can now be clicked to directly open attachments..</p>

Main Menu / Issue	Sub Menu / Sub Issue	Description
Mail	Mail Sent Date and Time	<p>The Sent Date and Time in relation to when an item of mail is sent, is now captured based on the Time Zone preference defined via the Project Details and is displayed in standard mail templates in UTC format (with the offset from GMT).</p> <div data-bbox="668 434 1479 667" style="border: 1px solid black; padding: 5px;"> <p>Reference No.: HCC-000046 Project Title: Training01 Project for TeamBinder</p> <hr/> <p>Date: 21 June 2014, 12:03:13 PM +10:00 To: Frank Jacobs, Engineering Project Services</p> </div> <p>In the above example, the +10.00 indicates that the time zone defined for the project is 10 hours ahead of GMT.</p>
Mail	Create your own Mail Types	<p>It is now possible to add your own Mail Types into the Project. This is done via the <i>Configure Mail Workflow</i> window which in turn is available via the <i>More</i> button within either the Inbox or Sent Items.</p> <div data-bbox="668 972 1479 1440" style="border: 1px solid gray; padding: 5px;"> <p>Configure Mail Workflow</p> <p>New Refresh Print Close</p> <p>Mail Type Title Mail Resp Days Fwd Type</p> <p>CA Consultant Advice 20 CA, MEMO</p> <p>LETTER</p> <p>LIVE</p> <p>MEMO</p> <p>NCR</p> <p>RFI</p> <p>RFI-R</p> <p>SCRFI</p> <p>SI Site Instruction 0 AMT</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>New Mail Type</p> <p>Mail Type: AI</p> <p>Title: Architects Instruction</p> <p>OK Cancel</p> </div> </div> <p>To create a new mail type, simply click the <i>New</i> button on the tool bar and then enter the Mail Type abbreviation and Title.</p> <p>The new mail type will have all the features of all standard Mail types in TeamBinder (sequential numbering within the mail type etc.). Customisation of mail types added can still only be done by QA Software.</p> <p>Note that the ability to create new mail types is restricted to the Project Administrator.</p>

Main Menu / Issue	Sub Menu / Sub Issue	Description
Mail	External Contact Mail Attachments as hyperlinks	<p>When sending TeamBinder mail to an External contact (a contact in the address book that is not a user of the system), any attachments that are currently attached to the TeamBinder mail are directly attached to the email. This is because the external contact does not log into TeamBinder to view the mail.</p> <p>A problem arises if the attachment file sizes are large and the external contact's email system has file size restrictions on attachments.</p> <p>With the latest release of TeamBinder this issue is overcome by the system including only links to attachments on TeamBinder mail to external contacts where the total size of attachments exceeds the file size limit defined via the Project Settings. The external contact in this case downloads the attachments from the mail they receive within their normal email system in the same way that documents are downloaded from transmittals/document notifications.</p>
	Drafts Register – Customise	<p>It is now possible to display three mail review related fields within the Mail Drafts register (and on Draft Mail Register reports) via the Customise option:</p> 
	Deleted Mail Reports	<p>Two new reports have been added to the <i>Standard Reports – Mail Module</i> Reports to be able to report on Deleted Mail.</p> <p>The two new reports are:</p> <p>080 - Deleted Mail Items – Summary</p> <p>085 - Deleted Mail Items - Details</p>
Documents	Document Register – Customise	It is now possible to display the Sender and Sender Company within the Document Register via the Customise option.
	Document Register - Checked Out	It is now possible to sort the Document Register using the Checked Out column.

Main Menu / Issue	Sub Menu / Sub Issue	Description
Workflow	Send to Coordinator	<p>A new option to be able to control whether Reviewers within a document workflow can choose to bypass the remaining reviewers and pass the next review back to the review coordinator has been provided via the <i>Project Settings</i> → <i>Document</i> tab.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <input checked="" type="checkbox"/> Allow changing details of multiple documents <input type="checkbox"/> Notify users about document deletion by default <input type="checkbox"/> Allow Bypass Review </div> <p>Unless ticked, the ability to Bypass remaining reviewers is not permitted.</p> <p>Note that not all projects have the Bypass option available to them. Please contact QA Software if the above options are not listed in your Project Settings.</p>
	Visual Workflow Designer	A new graphical interface to make it easier to design and manage review teams has been included with this release of TeamBinder. It is explained in more detail in the next section.

Workflow - Visual Workflow Designer

It is now possible to define the workflow within a review team using a visual designer as an alternative to the existing method of defining reviewers in a table with sequences.

From within the *Document Rules* window (under *Administration*) select Review Teams and double click on a review team to edit it.

<input type="checkbox"/> Name	Company	Sequence	Duration (Days)	Optional	Either
<input type="checkbox"/> George Robinson	Engineering Project Services	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Adrian Hinkley	Engineering Project Services	<input type="text" value="2"/>	<input type="text" value="1"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Frank Jacobs	Engineering Project Services	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Fred Bassett	Haslam Construction	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Jake Solid	Solid Builders Australia	<input type="text" value="3"/>	<input type="text" value="2"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Krish Vahini	Engineering Project Services	<input type="text" value="3"/>	<input type="text" value="2"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click on the Review teams tab and you will see the traditional grid view defining the review team members.

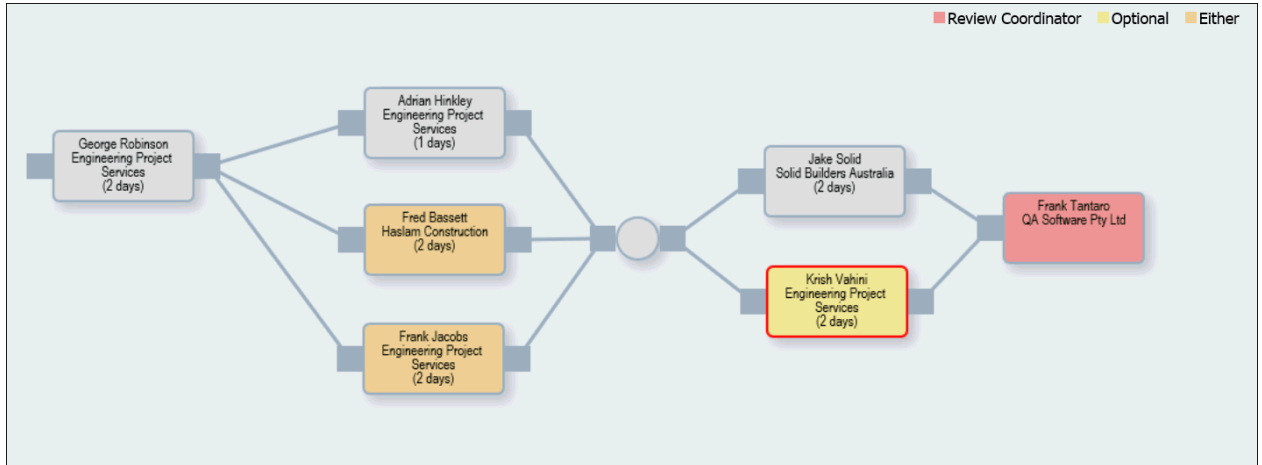
[Visual Designer](#)

Click on the new Visual Designer link at the bottom right of the screen.

The first time the visual design screen loads a help message window will appear as shown below.

New reviewers can be added by clicking on the Add Reviewer button or dragging a line from an existing endpoint to an empty space. Reviewer details can be edited by double clicking on the reviewer node.

Do not show this message again



The simplest way to add new reviewers and work within the designed is to click and drag from the nodes to the right or left of each box to draw new connecting lines. If you draw a connecting line into an empty area it is assumed you are adding a new reviewer and the new reviewer window will appear where you can enter the review details.

Reviewer Details

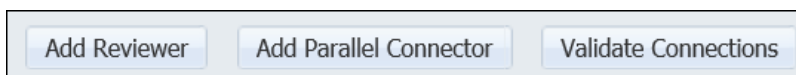
Company:

Contact:

Duration:

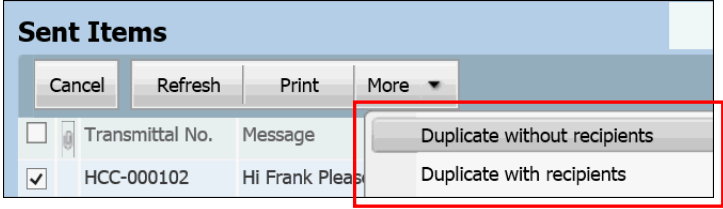
Optional Either

To edit an existing reviewer simply double click on the reviewer in the designer to load the above window. It is also possible to add a new reviewer using the button at the bottom of the window.



The Add Parallel Connector button is required if you want to have more than one set of reviews in parallel directly following each other within the same workflow (this is the case in the example workflow shown above).

Main Menu / Issue	Sub Menu / Sub Issue	Description
Transmittals	Read/Unread Feature	<p>Transmittals displayed in the Incoming Transmittal Register are now displayed as Unread (in bold) until a user opens the transmittal (in the same way that Mail is Unread until opened).</p> <p>Right click on a transmittal to Mark as Unread / Read if needed.</p> <p>Notes for users with Company/Department access to transmittals:</p> <p>(a) If you are not the recipient on a particular transmittal you will see the incoming transmittal as read if at least one recipient from your company/department has opened it.</p> <p>(b) If there are multiple recipients on a transmittal from your Company/Department, by default only one instance of the transmittal is displayed (your own if you are a recipient or the first recipient's entry if you are not a recipient). Use the Show duplicate company transmittals option to see all entries (including their read/unread status).</p>
	Company Access	<p>Users with Company or Departmental Access to transmittals now have the following functionality available to them in the Sent Transmittal Registers to better manage transmittals on behalf of other users in the same Company / Department.</p> <ul style="list-style-type: none"> • Update – Ability to update the Acknowledgement Received and/or Response Receive Dates for Sent Transmittals • Cancel – Ability to Cancel a Transmittal • Resend – Ability to Resend a Transmittal <p>The User also requires Send access for the transmittal type being managed. (See section below on Sending Transmittals for Review for information on how to set the Send Access for a User).</p> <p>Previously this functionality was restricted to only the originator of the transmittal.</p>

Main Menu / Issue	Sub Menu / Sub Issue	Description
Transmittals	Duplicate	<p>When creating a new transmittal by duplicating an existing transmittal it is now possible to choose whether or not to include the recipients from the transmittal being duplicated on the new transmittal (previously the recipients were always copied). This new option is very useful if a set of documents on an existing transmittal need to be sent to a different group of recipients.</p>  <p>This new Duplicate option is available in each of the Transmittal Registers.</p>
	Sending Transmittals for Review	<p>A great new feature has been added to the Transmittals module better control who can create and send Transmittals and to enable Draft Transmittals to be sent for review prior to them being sent to the recipients. See the next section for more details on this.</p>

Transmittals - Ability to Send Transmittals for Review

A significant new feature in this release of TeamBinder is the ability to send Transmittals for Review before they are sent to the intended recipient(s). This functionality is identical to the existing Send Mail for Review feature.

A. Defining the Transmittal Type Access Levels

The first step to use this new feature is to define on a per Security Group basis the access to be able to create, send or just read transmittals. This is in addition to the normal module level access for each user which for the transmittal module the options are: None, Personal, Department or Company.

1. Click on the **Admin** button at the Dashboard
2. Click on the **Manage User Access** option at the Admin page of options.
3. Select the first Security Group in the upper grid that lists the Security Groups.

Security Group: Consultant					
Mail Type Access		Users	Transmittal Type Access		
Transmittal Type	Title	Read	Draft for Review	Send	
General/Revised	Latest Document/Latest Revised Document Transmittal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Restrained	Review Document Transmittal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Superseded	Superseded Document Transmittal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Rejected	Rejected Document Transmittal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

4. Click on the **Transmittal Type Access** tab in the lower grid,

Listed are the various transmittal types (and access needs to be defined for each type). Note that transmittal types can also include the various Package module notifications.

5. For each transmittal type, tick the required access options which are as follows:

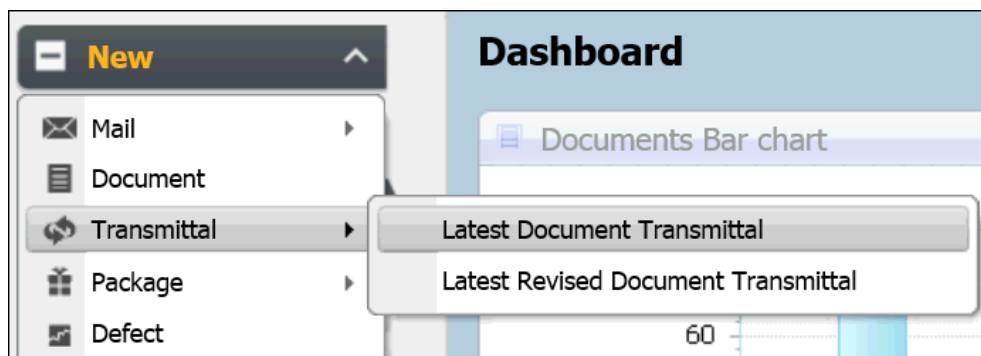
- **Read:** Can only view transmittals.
- **Draft for Review:** The User can create new transmittals and send them for review but cannot send them to final recipients.
- **Send:** The User has full access to create transmittals, send them for review and send them to the final recipients.

Notes:

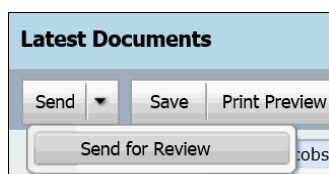
- Since all users with access with the transmittal module have previously been able to create transmittals, by default after the latest release of TeamBinder is deployed, all users will have all three options ticked.
- When a new Security Group is created, all options are un-ticked by default.
- Only users with Send access can Send/Resend/Cancel a transmittal

B. Creating a Transmittal and sending it for Review

When creating a new transmittal, assuming you will only see transmittal types listed for which you have Send and/or Draft for Review access.

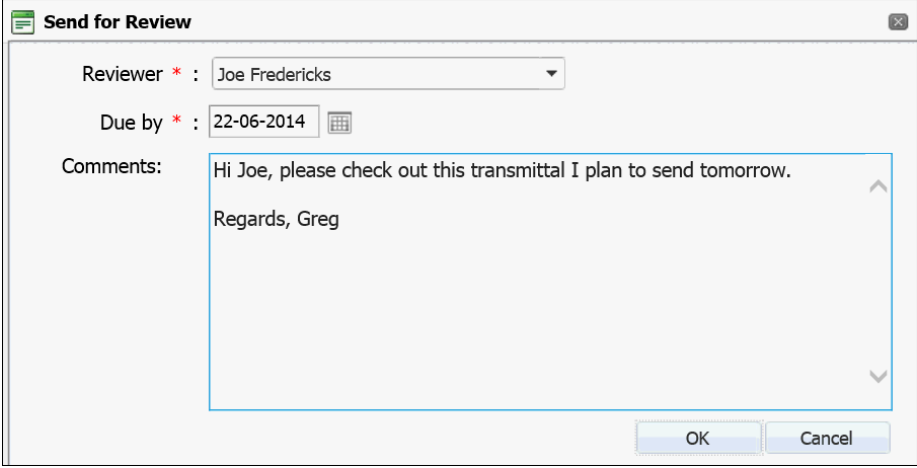


After creating the transmittal in the normal way, click the Send button drop down and select **Send for Review**:



Note that the **Send** button is disabled for users and **Send for Review** is their only option.

If Send for Review is selected, complete the Send for Review details as shown below.



Send for Review

Reviewer * : Joe Fredericks

Due by * : 22-06-2014

Comments: Hi Joe, please check out this transmittal I plan to send tomorrow.
Regards, Greg

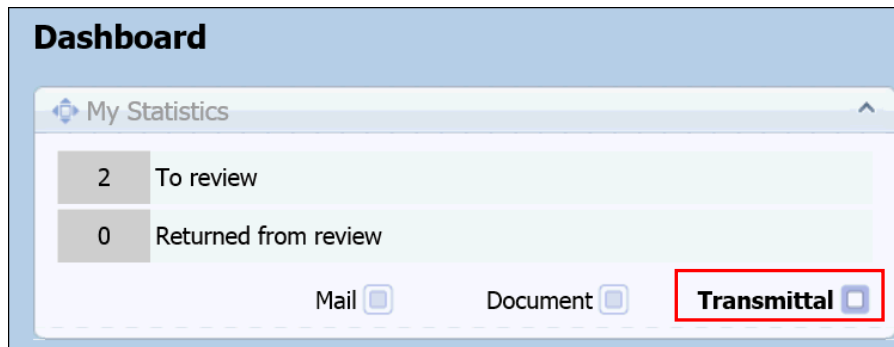
OK Cancel

The selected Reviewer will then receive an email notification in regard to the need to review the transmittal.

Notes:

- (a) Only users in the senders company with Draft for Review or Send access will be listed as Reviewers.
- (b) User cannot modify/send a transmittal if the transmittal is under review; or the Logged in user is not the originator of the transmittal.
- (c) During the transmittal review process, the Originator of the Transmittal has the ability to cancel the review if required via a Cancel Review button in the Drafts register.

C. The Dashboard



Two new links have been added to the My Statistics widget at the Dashboard to give easy access to Transmittal awaiting your review or returned by the reviewer.

To Review: Transmittals to be reviewed by the logged in user

Returned from Review: Transmittal sent for review by you, where the review is completed.

Click the **Transmittal** option group to see these links.

D. Reviewing the Transmittal

Transmittals awaiting your review are listed in the Transmittal Drafts register.

Drafts - To review				Clear	Search all Drafts	Go	Advanced
<input type="checkbox"/>	Created	Subject	Message				
<input type="checkbox"/>	21-06-14 10:57 AM	LV Electrical Documents for Review	Hi Frank Below are the LV Electrical drawings for				
<input type="checkbox"/>	21-06-14 10:47 AM	Preliminary HV Electrical Drawings	Hi Frank Please find herewith the Preliminary HV E				

When you open a transmittal awaiting your review by clicking on it the Transmittal Originators review request will be displayed:

Transmittal for Review			
Originated By:	Greg Harrison		
Requested By:	Greg Harrison		
Due by:	22-06-14		
Comments:			
Date	Name	From Company	Comments
21-06-2014	Greg Harrison	Houston Contracting	Hi Joe, please check out this transmittal I plan to send tomorrow. Regards, Greg

Latest Documents	
Send	Save Print Preview
Send for Review	

After clicking OK and reviewing the transmittal the reviewer can either send the transmittal directly by clicking the **Send** button OR they can return the transmittal to the originator by choosing the send for Review option.

If the Send for Review option is selected the reviewer then selects the originator of the transmittal and enters any comments of their own.

Send for Review	
Reviewer *	Greg Harrison
Due by	dd-mm-yyyy
Comments:	Hi Greg, transmittal looks fine, please send.

The originator of the transmittal will receive an email notification and their My Statistics widget at the Dashboard will be updated with a transmittal returned from review.

Transmittal for Review

Originated By:

Requested By:

Due by:

Comments:

Date	Name	From Company	Comments
21-06-2014	Joe Fredericks	Houston Contracting	Hi Greg, transmittal looks fine, please send.
21-06-2014	Greg Harrison	Houston Contracting	Hi Joe, please check out this transmittal I plan to send tomorrow. Regards, Greg

When the returned transmittal is opened from within the Transmittals draft register the originator sees the reviewer comments and can then send the transmittal in the normal way.

Main Menu / Issue	Sub Menu / Sub Issue	Description
Packages	Adding Recipients	<p>When at the Select Contacts window while adding Recipients to a package there is now a quick search option to search for contacts within the selected company.</p>
	Incoming Package Register	<p>Some major changes have been made to the Package Module to enable users to better see Packages that have been sent to them within TeamBinder. These changes are explained in detail in the next section.</p>

Packages - Changes to the Package Module

Previously the package register in TeamBinder displayed all the packages that have been created by your company. When packages were issued via Notifications these notifications were displayed via the Transmittals Inbox and Sent Items depending on whether you were the receiver or sender.

With this release of TeamBinder the packages module has been enhanced to have separate Package registers: Inbox, Sent Items and Drafts. This has the significant benefit that a recipient of a package notification within TeamBinder can now see the full package details and not just the incoming notification.

Inbox		Search all Inbox		Go	Advanced	Saved
Delete		Refresh		Print		More ▾
<input type="checkbox"/>	Package Type	Package ID ▾	Title	Phase/Reason for Issue	Date Released	Last Addendum
<input type="checkbox"/>	Tender	AR-GC	Architectural Package - Golf Clubhouse	Released for Tender	14-09-07	

Tender Package - AR-GC - Release For Tender		
Print Close More ▾		
Details Documents History		
History		
Transmittal No.	Type	Message
HCC-000002	Invitation	Please submit your best bid by the date listed.

The Package Notifications are still displayed within the Transmittal Inbox and Sent Items but received notifications can also be viewed via the Package listing within your Package Inbox (and opened from within this History tab)


Also from within the Package Inbox it is possible to

- Download documents
- Batch Comment on the documents in the package.
- Duplicate the Package (to create a new package)

Note that when duplicating a package from within the Inbox Register the recipients of the package (who are not displayed when viewed from within the Inbox) will not be brought forward. However all the documents which the user has full access to, will be carried forward while duplicating and the system will provide a prompt listing the documents which are not included to the user.





The Draft and Sent Items Package registers have effectively the same function as the previous Packages register with the only difference being that Drafts contains packages where the logged in user's company has created but not sent/issued while the Sent Items will show the packages the logged in user's company has sent.

Drafts Register

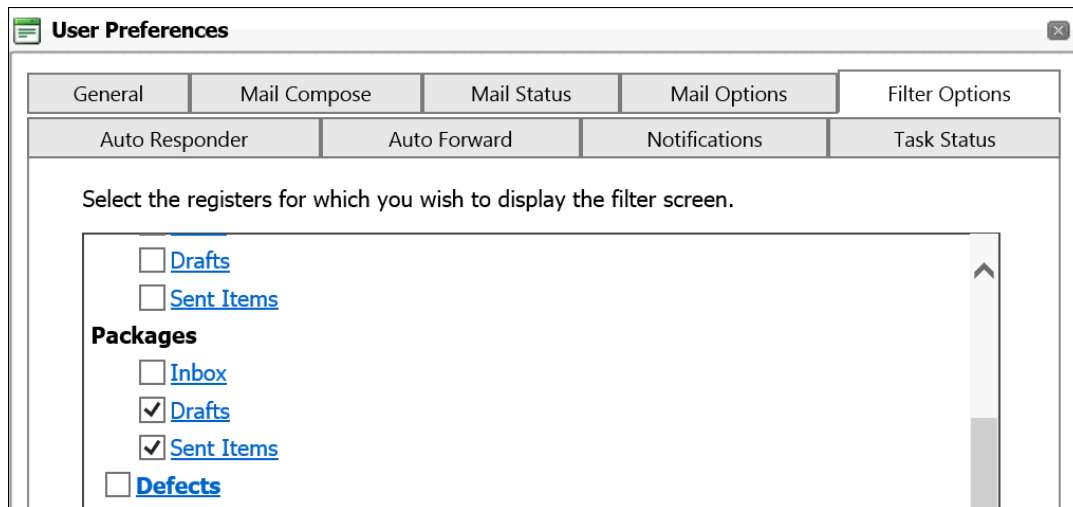
Drafts		Clear Search all Drafts		Go	Advanced	Saved
Delete		Refresh		Print		More ▾
<input type="checkbox"/>	 Package Type	Package ID ▲	Title	Phase/Reason for Issue		
<input type="checkbox"/>	Tender	EL-GC	Electrical Package - Golf Clubhouse	Prerelease		

Since the Drafts register displays only Packages that have not yet been sent, there are no columns in this register for Date Released etc. which will be displayed in the Sent register.

Sent Register

Sent Items		Clear Search all Sent Items		Go	Advanced	Saved	All
Delete		Refresh		Print		More ▾	
<input type="checkbox"/>	  Package Type	Package ID ▲	Title	Phase/Reason for Issue	Date Released	Last Addendum	
<input type="checkbox"/>	  Tender	AR-GC	Architectural Package - Golf Clubhouse	Released for Tender	14-09-07		


The *User Preferences* → *Filter* options have been updated to enable selection of whether the Advanced Search window should load when entering each of the package registers.



There are also 2 new reports added to the standard reports list. These are:

- Package Inbox summary Report
- Package Inbox detailed Report

Main Menu / Issue	Sub Menu / Sub Issue	Description
Admin	Default Date for the Advanced Searches	<p>It is now possible to set the default date range that is used in Advanced Searches that will apply to new users via the Project Settings. Previously for new users this defaulted to the last 2 days.</p> <p>This is a great new feature, if for example you prefer that the advanced search always defaults for all users to searching from the project start date.</p> <div data-bbox="673 1429 1187 1608" style="border: 1px solid black; padding: 5px;"> <p>Filter _____</p> <p><input type="radio"/> Within last <input type="text" value="2"/> business days</p> <p><input checked="" type="radio"/> Starting from <input type="text" value="01-06-14"/> </p> </div> <p>The above settings are controlled from the <i>Miscellaneous</i> tab at the Project Settings.</p> <p>Users can of course still adjust the defaults via the User Preferences – Filter options.</p>
Reports	Document Rules – Review Teams Report 100	<p>There have been a series of formatting enhancements to the Document Rules –Review teams report available under the Administration group of reports.</p> <p>The report now shows the sequence of each review and the Review Type as shown below.</p>

Administration Document Rules - Review Teams				Report No:	02.100
Training01 Project for TeamBinder				User:	Greg Harrison
				Run Date:	21/06/2014 12:40 PM
				Page:	1
					
Legend: ■ Optional - Your name is on for access only, no review necessary ■ Either - One of you must perform the review					
Code	Title	Review Coordinator	Reviewers	Sequence	Reviewer Type
ARCH	Architectural	Joe Fredericks (Houston Contracting)	George Robinson (Engineering Project Services)	1	Mandatory
CIV	Civil	Joe Fredericks (Houston Contracting)	Adrian Hinkley (Engineering Project Services)	1	Mandatory
			George Robinson (Engineering Project Services)	2	Mandatory
CP	SJ Test Free Form Review Team	Frank Tantaró (QA Software Pty Ltd)	Adrian Hinkley (Engineering Project Services)	2	Mandatory
			Frank Jacobs (Engineering Project Services)*	2	Either
			Fred Bassett (Haslam Construction)*	2	Either

B. Issues Fixed in Version 5.17 of TeamBinder

The following reported items have been resolved in this release:

Help Desk Reference	Description
HD-59847	An issue with the incorrect Review Coordinator being displayed within the "View Current review Status" window when the same document revision has been processed into multiple workflows has been resolved.
HD-60332	An issue with the notifications for "Delay in Document Review" being sent out daily until the review is completed, rather than at the interval defined via User Preferences has been resolved.
HD-62239	A problem with users not getting access to replacement view files (after the original view file is replaced) has been resolved.
HD-63308	The field tab order within the screen to process mail attachments as controlled documents has been corrected.
Contact Groups	It is no longer possible to add the same contact multiple times to the same contact group.
Various	There have been a number of very minor enhancements / fixes to the Standard Reports.

For more information on any of the new features above or Help Desk items, contact QA Software's TeamBinder Support team:

Phone: In Australia: 1800 727 102 Worldwide: +61 3 9291 0820

Fax: +61 3 9699 6293

Email: support@qa-software.com

Internet: <http://www.qa-software.com>

Contact details for other QA Software offices and distributors around the world may be found on our website.