

Non-Production Release Notes v12.1

EMPLIFI AGENT

OCTOBER 2023

INCLUDES RC1 AND RC2

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Introduction

This document describes the upcoming software changes in Emplifi Agent version 12.1. This document does not cover previous releases.

Update: This document has been updated and is inclusive of Release Candidates 1 and 2 of 12.1.

Most changes to the software are available immediately after you upgrade; however, some changes may require setup or configuration before you can use them.

Users of Internet Explorer (IE) Browser

Important: Microsoft ended support for Internet Explorer (IE) on June 15, 2022. Please visit the [Lifecycle](#) page on Microsoft's website for more information.

Emplifi Inc. supports the latest versions of the Chrome, Edge (including Chromium), and Firefox browsers.

Users of ePowerCenter Earlier than 10.5

Emplifi Inc. no longer provides Development support for ePowerCenter versions earlier than 10.5. Please contact your Customer Success Manager to plan for an upgrade.

Users of PCEmail using CIC 2015 R1 and Earlier

Emplifi Inc. no longer provides support for CIC 2015 R1 and earlier versions for PCEmail users. Please contact your Customer Success Manager to plan for an upgrade.

Help File

The Emplifi Agent Help provides detailed documentation on how the system works. To display the Help topics provided in your most recent upgrade, click the **Help** button (or press [Ctrl + F2]).



New Features/Enhancements

This is primarily a maintenance release for Agent, but there are a few notable enhancements to support improved workflow for administrators.

Better handling of large attachments with Email (A11-1249)

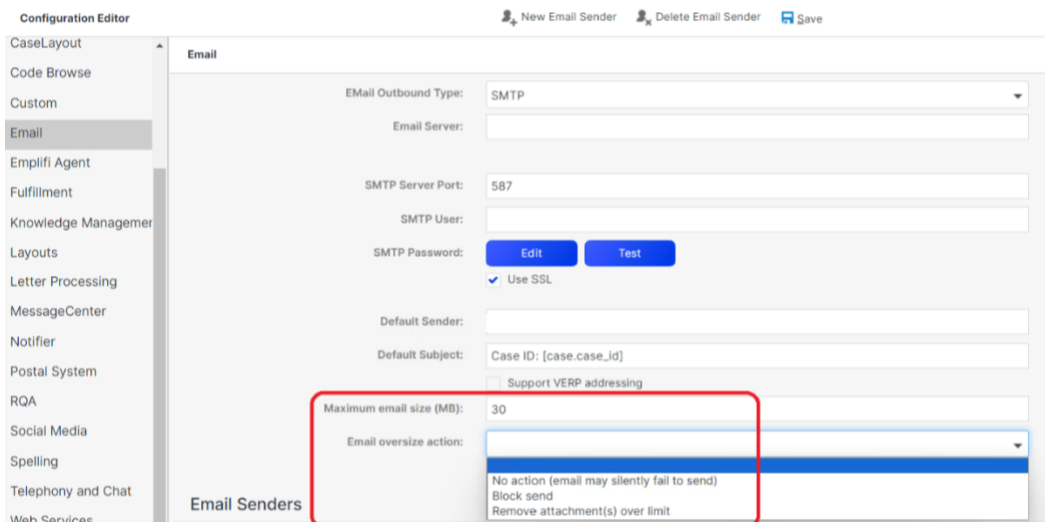
Several updates have been made to better handle large case attachments being send via email:

Email Size Limit

A size limit can be defined in a Configuration (Email) that is used to prevent large emails from being sent. This feature is designed to prevent/reduce emails from being returned by corporate email systems that enforce size restrictions. The size limit is an estimate and should be set several MB below any anticipated limits to account for rounding/estimating errors. For example, if the email size limit for your corporate email server is 16MB then 12MB is a reasonable limit.

The 'Email oversize action' setting is used for automated emails (such as Notifications triggered by an Action). Messages and Notifications that are sent manually provide users with a warning and allow the user to adjust the included attachment(s).

- **No action** (or is not specified) will ignore the limit.
- **Block send** will stop the Notification from being sent and log the failure in the Notification log.
- **Remove attachment(s) over limit** will remove attachments until the estimated size is below the specified limit. Adding 'Responsible Rep' to the CC or BCC to a Notification has been added to provide visibility to resulting email.

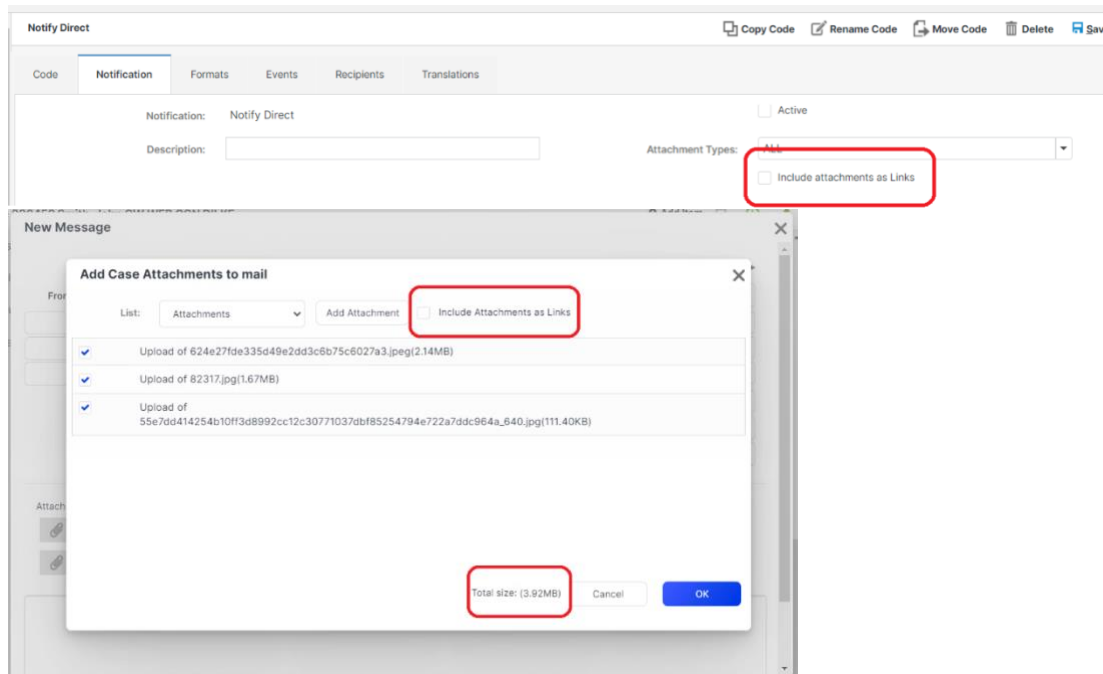


The screenshot shows the 'Configuration Editor' interface for 'Email' settings. The 'Email oversize action' dropdown menu is open, showing three options: 'No action (email may silently fail to send)', 'Block send', and 'Remove attachment(s) over limit'. The 'Maximum email size (MB)' is set to 30. Other visible settings include 'Email Outbound Type: SMTP', 'SMTP Server Port: 587', and 'Default Subject: Case ID: [case.case_id]'.

If no configuration settings are made the current default behavior will be used (no limits enforced by Agent)

Send Attachments as Links

A new option has been added to Notification definition and the manual Message/Notification window that allows attachments to be sent as links (instead of attached files). Recipients must be named users in Agent (no license required) to view the attachments.



Enhancements to Layout Editor (A11-1354, A11-1101)

Updates have been made to the Layout Editor and Windows Details dialog to simplify the process of editing layouts.

Layout Editor Updates

It is best practice to edit layouts at the “highest level” needed. This is particularly important for systems that have multiple companies and/or configurations. The highest level is the ‘Standard’ layouts that come with the system (also commonly called the “base layouts”).

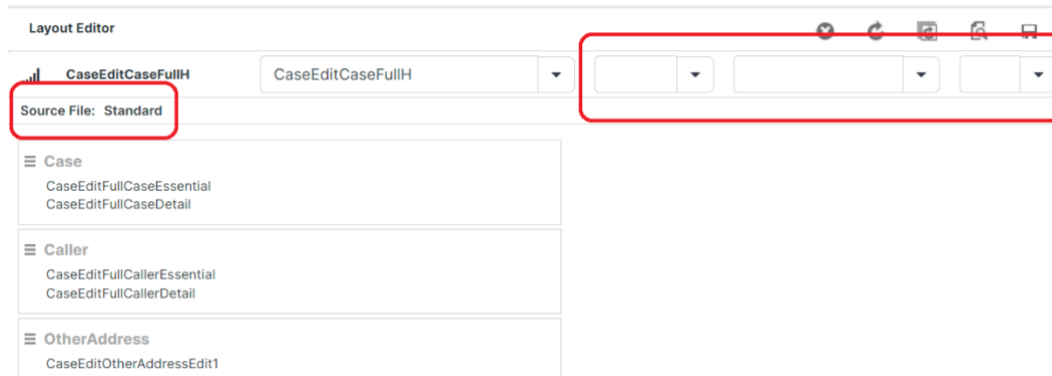
Layouts are edited via the LayoutEditor, but are stored in XML documents. The naming convention of these documents is helpful in understanding the “Level” of the layout being edited:

- The highest of layout definitions are stored in the ‘LayoutList.xml’ file in the systems ‘custom’ folder. Edits made at this level will apply to all user that do not have a lower-level layout edited. It is used for the baseline layouts used by most (or all for simple deployments where user/role-specific layouts are not needed).
- The next levels are based on the Company, Configuration, and then Language
- The ‘Lowest Level’ would be ‘LayoutListCSYSGDEFAULTen.xml’ for most systems

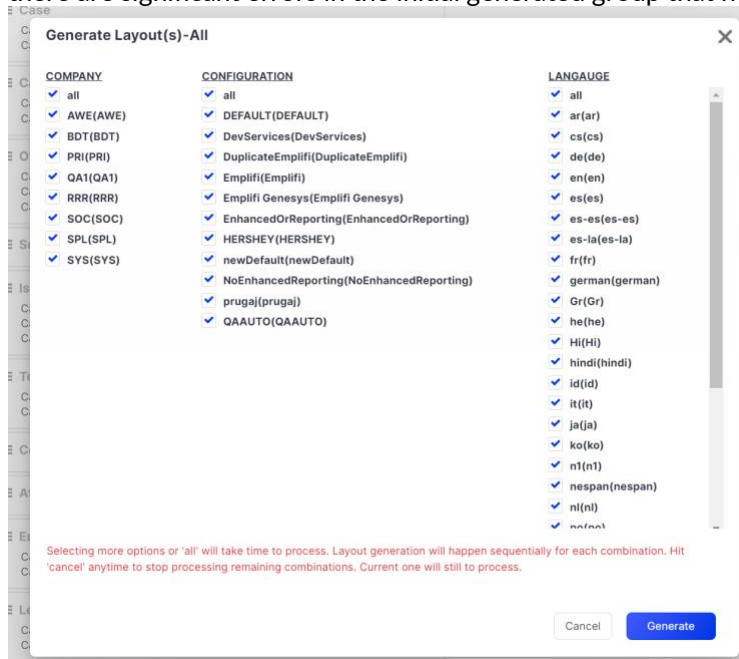
To promote the best practice of editing at the highest level and to provide better visibility to the level being edited, the layout editor will now default to displaying the layout at the level that is being used for the current user.

Example, if the ‘CaseEditCaseFullH’ has been edited for the SYS Company and users in the DEFAULT configuration, then the Source File will be ‘LayoutListCSYSGDEFAULT’. If the layout has not been modified at any level, it will be ‘Standard’.

Prior to 12.1, the default values for these elements were based on the current user and there was no visibility to the current customization level. This contributed to users inadvertently editing the layouts at a lower level than was likely needed (which could cause duplicate effort and increased complexity).



A new dialog has also been added that provides more granular control when generating layouts. Layouts will be generated for each combination specified as a separate call to the backend. This will allow the process to be cancelled during the process if a large regen request was accidentally made or there are significant errors in the initial generated group that need to be addressed before proceeding.



Quick Access via Window Details

Several updates have been made to the Windows Details dialog (accessible via Ctrl+Q, user must be in an active field)

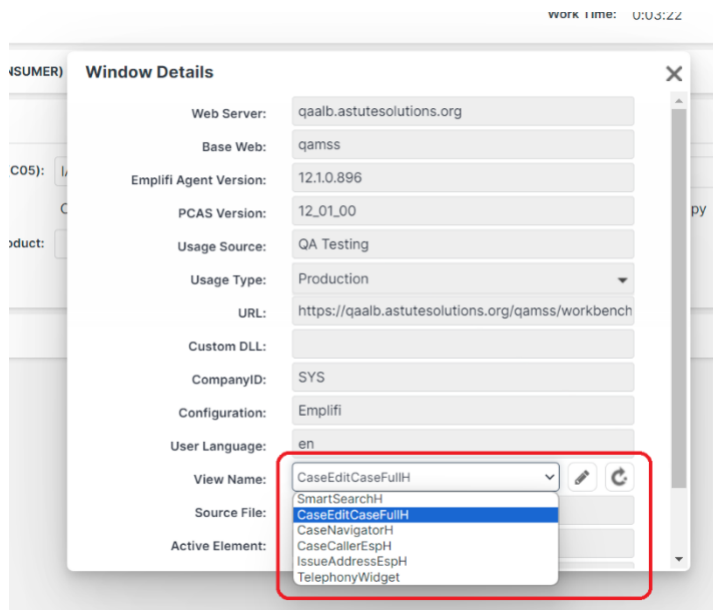
The 'View Name' now has drop-down that displays the layouts present in the current view



The current layout can be regenerated and reloaded directly from this window



The 'Edit Layout' button will open the Layout Editor and navigate to the selected layout/view.



Summary of new features/enhancements for version 12.1

New Feature Description	User Impact	Case ID	Project ID
The default view in Admin for key "Code+Table" categories and configuration elements is now the "Table" instead of the "Code". Example: when you navigate to a Product/C01 code, the 'Product' tab is displayed by default instead of the 'Code' tab. This is part of the 'Save-a-Click' initiative.	Administrators		A11-1356
If "Export date time in sortable format in Excel" is checked on the Case Listing Report, but invalid data is trying to be used, the Report will be created with the data as a text string, instead of an Excel date for that cell.	Administrators		A11-1394
Another "Save-a-click" item: Users will now be kept in place when saving a Configuration. Previously, the Configuration was reloaded, and the user was moved back to the first section.	Administrators		A11-1342

New Feature Description	User Impact	Case ID	Project ID
A new feature has been added that allows a detailed case report (defined using Standard Letters of type 'Label') to be generated for each case that is selected in a Case Listing report. This feature existed in the Classic version of ePowerCenter.	Administrators	144484 202729	A11-344
Enhanced the layout editor to provide better visibility and control for editing layouts and different “levels”.	Administrators		A11-1354
Enhanced the product to make it easier to find the correct layout to edit and make regenerating layouts easier.	Administrators		A11-1101
Added the ability to select a different number of results that should be returned when using the Single Address lookup. Default if left blank is 5.	Agents		A11-1361
Added the ability to retrieve the latitude/longitude from address providers for Single Line Address Lookup (if licensed).	Administrators		A11-1319
<p>Several updates have been made to better handle large case attachments being send via email:</p> <ul style="list-style-type: none"> • A configurable email size limit. • Ability to send links (instead of attached files). • 'Responsible Rep' can be added as cc/bcc recipient to Notifications to provide more visibility to automated processes. 	All		A11-1249
Moved 'Support Tools' to Application Menu (above 'About'), if enabled/requested via Emplifi Support team.			A11-1441
<p>SCIM (System for Cross-domain Identify Management) Service to support enterprise Automated User Management systems to provision/manage users in Agent.</p> <p>Note: technical services from Emplifi are required to deploy and support configuration of this service</p>	Administrators		A11-1412

Bug Fixes

Summary of fixes to software elements for version 12.1

Bug Fix Description	User Impact	Case ID	Project ID
Fixed an issue where in Standard the Date Picked and Date Voided labels were reversed in the Check Register Utility.	Reporting	261327	A11-1167
Fixed an issue where the second or later issue on a case didn't always correctly enforce suggested mandatories prior to the save.	Agents	263748	A11-1164
Made it easier to click on the buttons on the Case Edit page.	Agents	267457	A11-1265
Fixed an issue editing time frames for a company other than SYS.	Administrators	251394, 262356, 262693	A11-159
Updated Administration so that updating a password through User and Security Setup will enforce the Password Policies in System Setup.	Administrators	146617, 262744	A11-205
Fixed an issue where the Date Picked and Date Voided labels were reversed in the Check Register Utility.	Administrators	139419, 259827	A11-963, A11-1117
Fixed the Copy Survey option to properly show an error message if trying to use a name with invalid characters in it.	Administrators		A11-1301
Fixed the login page to properly be translated.	All		A11-258
Updated the validation check to prevent codes from being created with invalid characters.	Administrators	145580	A11-120
Updated the log file for PCEmail to have the label "PCEmail" in the file name.	Administrators		A11-1390
Fixed an issue where adding a schedule could convert the Favorite to a folder.	Administrators	265245	A11-1303
Added support for saving/sending a Chart report as an image file (PNG, JPEG, GIF, BMP, SVG) when scheduling.	Reporting	145767	A11-119

Updates included in RC2

The following items were added/updated in Release Candidate 2 of version 12.1

Bug Fix Description	User Impact	Case ID	Project ID
Updated Frequency Report to display folders if the "Threshold" is set to 0, even if there are no items reported for that folder.	Reporting		A11-1457
Fixed an issue where the Survey Properties dialog didn't show the addresses and issues in the drop downs.	Agents		A11-1518
Fixed an issue with the Layout Editor not showing the correct sub-layout and not hiding the edit icon for users that do not have admin access.	Administrator		A11-1522