

HelpMaster 24.0.34.34

Release date May 08, 2024

Release type Maintenance for v24.0.x - Upgrade is recommended

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v24.0.0.0

Database version 177.13

Notes

This is a maintenance release. All modules of HelpMaster (desktop clients, Email Manager, Priority Manager, Active Directory, Web Portal) will need to be upgraded also.

Enhancements

Desktop

41736 Action Templates will now allow the "Previous Assignee" to be configured for an Email Template at all times. This was previously only possible if the "Assigned to" checkbox was checked.

This change allows better flexibility for creating Action Templates that can be used to send an email to the previously assigned-to person, whenever the assignment changes.

Fixes

Desktop

41719 <Undefined> system codes for Job Type, Priority, Contact Type and Issue have been implemented in the web portal similar to the Desktop version. Staff members that are in the Administration Application Security Role will now be prompted about any <undefined> codes in both the Desktop and Web portal whenever they attempt to update a job via an action.

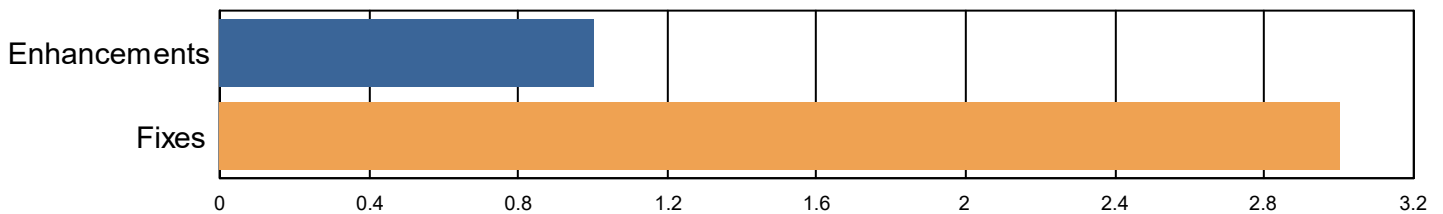
41722 Job Field Decision workflow item would fail with both "Job Type" and "Contact Type" job fields selected. These issues have been fixed.

Web Portal

41731 Web password type control set fields were allowing autofill. This has now been explicitly disabled to prevent this behaviour.

Release summary

Total number of changes: 4



HelpMaster 24.0.30.30

Release date April 12, 2024

Release type Maintenance for v24.0.x - Upgrade is recommended

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v24.0.0.0

Database version 177.13

Notes

This is a maintenance release. All modules of HelpMaster (desktop clients, Email Manager, Priority Manager, Active Directory, Web Portal) will need to be upgraded also.

Enhancements

Desktop & Web Portal

- 41578 Control set entity "SelectorType"(s) with suffix "...OfPrimary[Entity]" were not displaying anything in the list when added to Client, Site or Asset entities. This was because either the primary entity didn't exist or was out of context. These selector types will now also refer to the main entity screen as defaults if the primary linked entity is not relevant e.g.
1. Asset selector on site screen has "AssetsOfPrimarySite", PrimarySite when on site screen = Site entity Asset links.
 2. Site selector on Client screen has "SitesOfPrimaryClient", PrimaryClient when on client screen = Client entity Site links.
- 41603 Added the ability to search for Assets based on the barcode "Value" and the "Location" fields. Barcode value must be entered in full as there is no partial matching on this search field.

Email Manager

- 41604 Added missing control set entity selector fields to the email parser so that entities can be selected and populated in the Client, Site, and Asset entity pickers. Entity PKID or full Name needs to be specified or the entity will not be populated.

Web Portal

- 41644 Added the ability to search for client "ClientID" when it contains numerals only or a combination of characters. This applies to both the Desktop app and the web portal, as well as the Desktop's "Entities" toolbar search field for Clients.

Fixes

Desktop

- 41460 Asset importing was only linking the first asset to linked clients and sites on the first pass. This has been corrected and all assets will now be linked to their respective clients and sites on the first pass.
- 41464 Editing a closed job was not always allowing changes to Control Set date fields. This has been fixed.
- 41542 Searching with Job Finder on Control Set dates with the operator set to "In the future", was causing an error to occur. This has been fixed.
- 41543 Adding an approval to a job manually may cause an error to occur when clicking on OK to save the approval. This has been corrected.
- 41547 From a Workflow Template, when clicking on the "Dependencies" tab, an error would occur. This has been fixed.
- 41561 Workflow script objects were not retaining text formatting after being saved and re-opened in both workflow templates and job templates. This has been fixed.
- 41573 The Active Directory Event Log list view label was incorrectly labelled "Email Manager Events". This has been corrected and now displays "Active Directory Events" as it should.
- 41574 An error would occur when blanking out the "Name" of a drop-down control and tabbing or entering with a blank name. This has been fixed by making it impossible to do so, a new name must be typed first or the previous name will be re-populated.
- 41591 Updating assets may cause an error to occur when opening an asset. We have added additional error checking and have trapped the reported error, which is not critical and can be ignored without any issues. Hopefully this error will no longer occur. Please send details to support@prdsoftware.com.au if it does recur.
- 41607 The workflow "Group" object was incorrectly rendering as an "End" object. This behaviour has been corrected.
- 41621 Importing jobs was failing with an error due to validation for blank Action Details. This has been fixed.
- 41642 Adjusting items from the "Properties" tab when adding a new action may cause an error to occur. This has been fixed.
- 41659 Common Function suggested output variable names were not using capitals but were being converted to all lower case. This has been corrected and suggested variables will now use capitals as specified.
- 41664 When pasting more than about 120 characters into the QR Code "Value" fields an application error would occur. Currently our QR Codes are limited to approximately 120 characters but exceeding this will no longer throw an error, it just won't create the QR Code until the characters are reduced below the limit.
- 41673 Having a comment at the end of Custom SQL in Job Finder, e.g. "--This is a comment", without a carriage return after it was causing an error to occur. This has been fixed and will no longer cause an error.

Desktop & Web Portal

- 41646 When using workflow to log a job with an assignment override, the override does not work if the Job Template is not linked to an Action Template. This has been corrected and Job Assignment overrides now work as expected.

Email Manager

- 41566 In a workflow Action object the "Reassign" modifier was not functioning at all. This has been fixed and it now works as it should.

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Notes

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Fixes

Email Manager

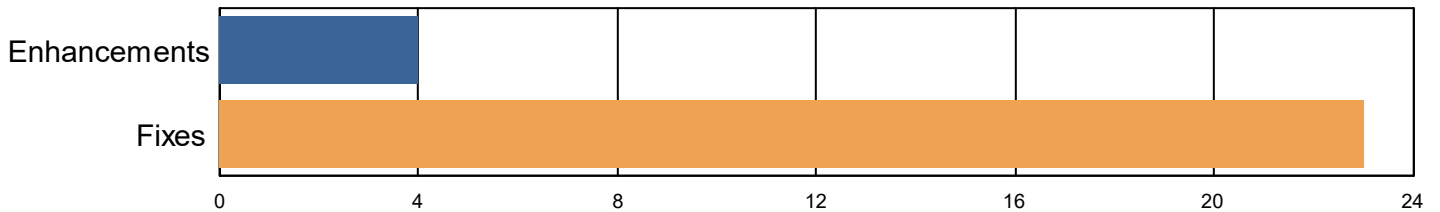
- 41572 When creating a new "Add an action to an existing job" email manager profile, on the "Filter and Workflow" step, selecting and adding the "Add Action" workflow item would cause HelpMaster to close unexpectedly. This has been fixed.

Web Portal

- 41562 Images inserted into the "Details" HTML section of Request Catalogs were not displaying when selecting the request catalogs from the web portal. This has been fixed.
- 41567 Logging a new job from workflow via the web portal, where the job template contained control sets and was also importing control sets from the parent job, would cause an unexpected error to occur. This has been fixed and the job will log without errors.
- 41616 The web portal was incorrectly validating the "Assign To" field on the selected web default Action Template for client logins. This has been corrected and the "Assign To" field on this Action Template may now be left blank. The validation error will no longer occur for client web logins.
- 41617 Fixed a bug in the "Re-send approval request email" where it was sending the "Approval result" email incorrectly instead of the "Approval request" email. Also improved the approvals user interface for better readability and functionality of the "Re-send approval request email" button.
- 41663 When a job was deleted using the "Delete" button on the properties tab via the web portal, the resulting message was always reporting "Child Job# xxxx" even for non-child parent jobs. This has been corrected.

Release summary

Total number of changes: 27



HelpMaster 24.0.0.0

Release date December 01, 2023

Release type Feature update release. Upgrade is recommended-

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v23.4.38.74

Database version 177.12

Notes

This is a new feature release version of HelpMaster that will require all modules of HelpMaster to be updated. See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v24/> for highlights

New features

Web Portal

- 41400 Added read-only email previews to the web portal for staff users. Also the ability to select different email templates from an action screen. Completed action emails can also be viewed from the action screen.

Enhancements

All HelpMaster Modules

- 41387 HelpMaster emailing functionality using Outlook Redemption has been updated to v6.4.0.6234.

Desktop

- 41477 Added two new email tags, <Job_Links_Jobs> and <Job_Links_Jobs_HyperLinks>. These can be found under the new folder node named "Job Links". <Job_Links_Jobs> will display a list of all job links inc. child jobs and standard job links. The second will display the same links but also with hyperlinks to the linked jobs on the web portal.
- 41524 Added Control Set email tags for Control Sets added to Change Requests.
- 41526 Increased size and script font for all locations of custom SQL and workflow script objects. Added a new "Preview" button to all workflow script objects and common tasks/decisions, to make debugging workflow easier by showing variable values. Common tasks/decisions can now be edited from completed workflow to display read-only script and to utilise the new "Preview" button for debugging.
- 41534 Added colourisation to all scripting windows and workflow objects similar to other colour schemes for SQL and PowerShell scripts.

Desktop & Web Portal

- 41369 Added new features to simple approvals as follows;

Workflow: If an approval is started from workflow, once the user approves or denies it, it will now automatically continue the workflow where applicable.

Desktop: Added approvals queues to the explorer screen, these allow showing the approval and voting. It will also continue workflow if started there. All approvals in the job action log can now be viewed by double clicking them.

WEB PORTAL;

Staff Login: Added approval queues to the explorer page, that allow viewing and voting on approvals like the desktop. Home page now shows the 3 most recent approvals awaiting votes.

Client Login: Added an approval queue which shows approvals clients need to vote on. Once voted on workflow will continue. Home page now shows the 3 most recent approvals awaiting votes.

- 41409 New "On-Create" workflow has been implemented, which will silently run as soon as a new job is created using a Job Template with on-create workflow defined. Mainly only silent workflow objects can be utilised but it will pause for a non-silent "Approval" until a decision is given, then it will continue silently until completion. A silent approval workflow object can also be checked in normal workflow, after the job has been logged, using the "Approval Result" workflow item.
- 41461 Added a new HelpMaster System user (with initials "HM") for when workflow runs out of user context. This is for display in "On-Create" workflow history and other automated action log items when any other user would be out of context.
- 41491 Asset selection lists will now pre-populate based on whether the Client and/or Site has been selected. If one is selected only the Assets linked to that entity will display in the list. If both are selected then Assets for both entities will be listed.
- 41494 Added an "Asset Selector" control type to control sets. This includes various "SelectorTypes" like the Client and Site selectors.

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Notes

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Enhancements

Desktop & Web Portal

41508 Added additional "SelectorType" properties to narrow down selection lists of Client, Site, and Asset control set entity selectors as follows;

Client

* ClientsOfPrimaryClientsSite

* ClientsOfPrimarySite

* ClientsOfPrimaryAsset

Site

* SitesOfPrimaryClient

* SitesOfPrimaryAsset

* SiteHierarchyOfPrimarySite

* SiteHierarchyOfPrimaryClientsSite

Assets

* AssetsOfPrimaryClient

* AssetsOfPrimarySite

* AssetsOfPrimaryClientsSite

Also updated the custom stored procedure search type to pass in the Client, Site and Asset to the stored procedure so that custom population routines can be easily created.

41535 Added an "End" workflow object specifically for on-create workflow only, as there is no user interaction possible there for a dialogue box or something similar.

Triggered Event Module

41403 Added 2 new triggered event filter types for dates, "is older than" and "occurs in more than... ..". Also added "Date Created" field searching on Knowledge Base articles.

Web Portal

41275 Improved the sign-in / authentication options for the Web Portal.

Fixes

Desktop

41505 After selecting an in variable for a common task or decision, when the out variable was created or selected, the in variable was being cleared and had to be reselected. This has been fixed.

Desktop & Web Portal

41335 New date field validation has been added to prevent date conversion errors. Dates must now be between the years 1753 to 9999 as per SQL Server limits. A dialogue box will warn the user if attempting to save a date outside of this range.

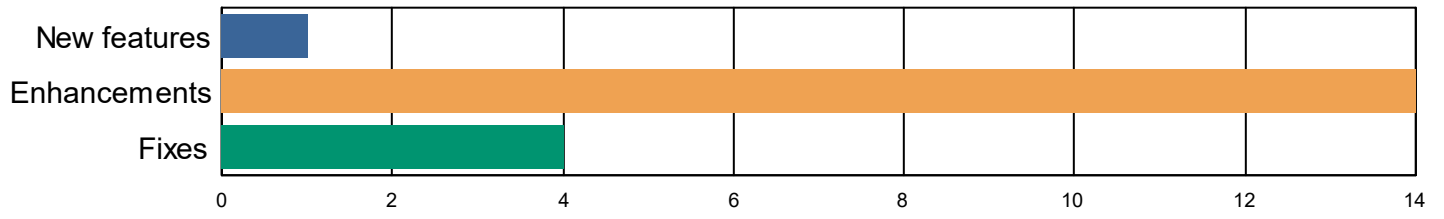
41496 There was a problem using date/time variables within a workflow PowerShell script object, when calling a REST API. This has been corrected. See help here, https://docs.helpmasterpro.com/docs/workflow/workflow-objects/script_powershell/#using-workflow-date-variables-in-powershell-scripts .

Web Portal

41499 Workflow script object was not running silently following a decision object. Also the script object was not saving correctly in the workflow history. Both of these issues have been fixed.

Release summary

Total number of changes: 19



HelpMaster 23.4.38.74

Release date September 27, 2023
Release type Maintenance - Upgrade is recommended

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v22.7.75.206
Database version 176.17

Notes
This is a maintenance release. All modules of HelpMaster (desktop clients, Email Manager, Priority Manager, Active Directory, Web Portal) will need to be upgraded also.

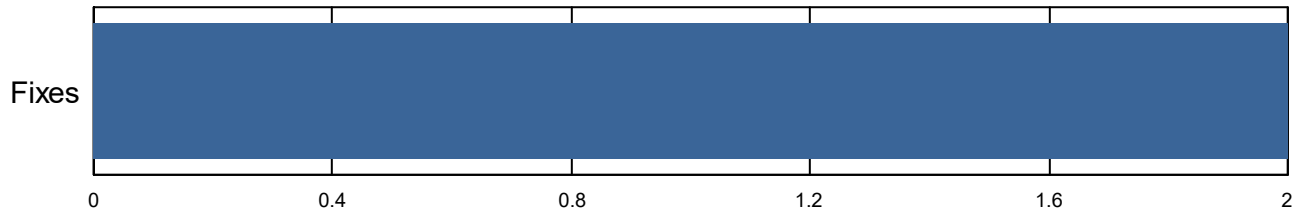
Fixes

Desktop

- 41438 Cloning an Asset was causing an error to occur. This has been corrected.
- 41442 The partial matching user preference option, "Match anywhere in results", was not functioning, so doing partial match searches from any entity on the toolbar was not returning results. This has been corrected.

Release summary

Total number of changes: 2



HelpMaster 23.4.35.71

Release date September 08, 2023
Release type Maintenance - Upgrade is recommended

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v22.7.75.206
Database version 176.17

Notes
This is a maintenance release. All modules of HelpMaster (desktop clients, Email Manager, Priority Manager, Active Directory, Web Portal) will need to be upgraded also.

Fixes

Desktop

41391 The system default email account was always being used to send email when using the new "Quick-Log" screen to log jobs. Email account overrides such as "My Preferences > Email" default, and "Email Template > Email Settings" were not being used as they should. This has been fixed.

Desktop & Web Portal

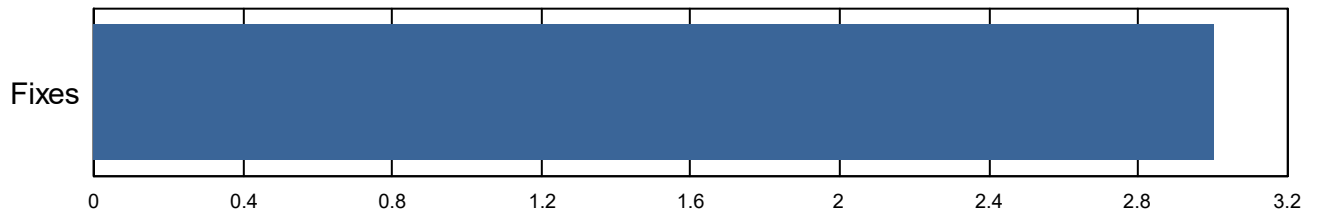
41395 When actions were added sending emails with embedded images from the web portal, previewing the email from the Desktop was not displaying the embedded images. The same embedded images were also not displaying in Outlook for the Web. These issues have been fixed.

Triggered Event Module

41397 Triggered events using custom SQL Based searches were not returning any results when clicking the "Show search results" button. It was not coded to work with custom SQL previously. This has now been added and search results will now show for custom SQL.

Release summary

Total number of changes: 3



HelpMaster 23.4.31.67

Release date June 07, 2023

Release type Maintenance - Upgrade is recommended

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v22.7.75.206

Database version 176.17

Notes

This is a maintenance release. All modules of HelpMaster (desktop clients, Email Manager, Priority Manager, Active Directory, Web Portal) will need to be upgraded also.

Fixes

Desktop

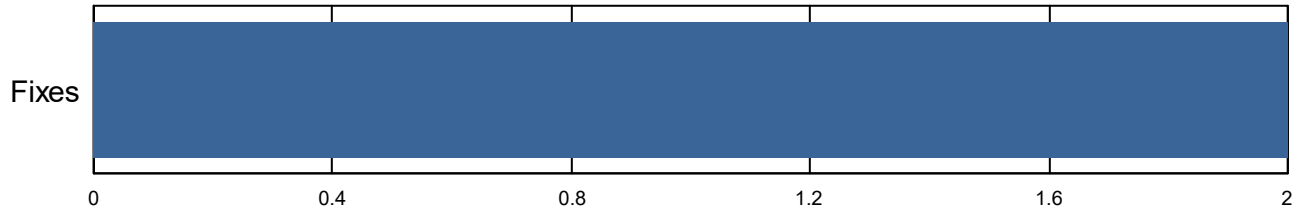
41368 Opening the client/site/asset search screen may throw an unexpected error if the computer timezone settings were set to some European timezone formats. This behaviour has been corrected.

Email Manager

41336 The Email Manager was not processing embedded email attachment files (.eml) correctly. This behaviour has been corrected.

Release summary

Total number of changes: 2



HelpMaster 23.4.24.60

Release date May 31, 2023
Release type Feature update release. Upgrade is recommended-

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v22.7.75.206
Database version 176.17

Notes

This is a new feature release version of HelpMaster that will require all modules of HelpMaster to be updated. See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v23/> for highlights

New features

All HelpMaster Modules

41048 The Control Set designer now has the option to generate a database query that can be used for reporting on Control Set data.

Desktop

40965 The log job screen has been redesigned in the Desktop version so that the default job logging process is much quicker and it can now be done from a single screen (rather than having to use the Action screen to assign the job). This can now be done directly on the job screen. Each job template may be overridden to revert to previous behaviour from the "Options" tab by checking (ticking) "Hide the Quick log section when logging a new Job (forces showing the create and assign action screen)".

Desktop & Web Portal

41099 Upgraded the licensing model for both the web portal and Desktop in HelpMaster v23. Previously the web only had "named staff" licensing and the Desktop used concurrent licenses. Now there is the option of both types of licensing in both products at differing price points. All existing clients will inherit the more expensive "concurrent" licenses matching their current license allocation. New clients may purchase according to their requirements.

All licenses can be managed and monitored from "Administration" (toolbar) > "System Administration" (screen) > "User Management" (section).

Enhancements

All HelpMaster Modules

41050 The following new email tags have been added to the "Job" tags;
<<Job_AssignedTo_Phone>>
<<Job_AssignedTo_Email>>
<<Job_ClosedBy_Phone>>
<<Job_ClosedBy_Email>>

Desktop

40927 Job template images will now display in the template lists on the "Jobs" > "Log Job" toolbar section. This includes "My Templates", "All Templates" and "Recent Templates". Previously they only displayed on the web portal under Request Catalogs.
40934 Added a quick search function to the Issue (category) selector of new jobs, Job Finder, Job Templates, and KB article "Applies to". This will list matches to partially entered text for the first part of all Issues including sub-Issues. E.g. Type "help" and it will list any Issues inc. sub-Issues starting with "help" (helpmaster, helpdesk, help, etc).
41161 Updated Outlook Redemption to latest build v6.3.0.6164. See <https://www.dimastr.com/redemption/history.htm?refer=upgrade>

Desktop & Web Portal

41049 Removed the System Administration > General > Global options;
"Job summary field is required when logging or updating Jobs"
"Job details field is required when logging or updating jobs"

Changed default behaviour of the following Job and Action template options on the "Options" tabs;
"User must update the Summary set by this template when logging a new Job"
"User must update the Details set by this template when logging a new Job"
"User must update the Details set by this template when adding a new Action"

IF BLANK: Regardless of the settings the summary or details must be filled but only if it's possible to do so interactively. Services or silently added actions / logged jobs will not require updating regardless of settings.

PRE-FILLED: Any pre-filled summary or details must be modified by the user ONLY if the option is enabled (ticked). Again only for interactive jobs & actions. Services or silently added actions / logged jobs will use the pre-filled text as usual.

ACTION TEMPLATE OPTIONS: "User must update the Details set by this template when adding a new Action" and locking of "Action details" are now mutually exclusive as they should be. Also "User must update the Time taken when adding a new Action" and locking of "Time taken" are also mutually exclusive. Previously it was possible to have these options both enabled at the same time preventing the action from being completed interactively.

HelpMaster 23.4.24.60

Release date May 31, 2023
Release type Feature update release. Upgrade is recommended-

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v22.7.75.206
Database version 176.17

Notes

This is a new feature release version of HelpMaster that will require all modules of HelpMaster to be updated. See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v23/> for highlights

Enhancements

Desktop & Web Portal

- 41098 Redesign of the Microsoft and Google administration screens to have a separate authentication configuration. This allows for better tenant management and separation between email/user MS Graph configuration vs authentication options.
- 41217 Knowledge base article security/visibility has been improved to offer 3 options. Public, Logged in only, and Staff only. This gives better security granularity for all knowledge base articles.

Web Portal

- 40926 Added the ability for privileged staff users to "Delete" jobs from the "Properties" tab via the web portal.
- 40983 Added auto-assignment functionality to the web portal. Auto-assignment settings in action templates will now be fully honoured when logging jobs via the web portal.
- 41132 Added two new checkboxes to the login screen as follows...
"Remember me?" - This will remember the manually logged in user's session until the browser is closed.
"Remember my External log in?" - This will remember externally authenticated login sessions until the browser is closed.
- 41230 Web Portal actions now support the time taken for action feature as per the desktop edition. Time values stored in an Action Template will be displayed, and any time settings set in the Action Template will be enforced/applied on the web portal (lock time, user must update etc.)
- 41231 When re-assigning jobs via the web portal, once a staff member has been picked, the Skillgroup drop-down box will now automatically selected the skillgroup that the job is currently assigned to if possible. Previously, this would default to the staff members' default skillgroup (potentially re-assigning it out of the skillgroup, if the staff member belonged to multiple skillgroups).

An exception to this behaviour is when an Action Template is used that specifically re-assigns a job to a nominated skillgroup. In this case, this skillgroup assignment will be take precedence over all other defaults.

- 41232 When viewing a job via the web portal, the Workflow panel will only display when a job contains workflow. Previously the workflow panel displayed with a "No workflow" label.
- 41248 Removed a label on the logon screen regarding authentication if no external authentication options are configured.

Web Setup Utility

- 41136 Improved the error checking and feedback to user during website / webapi upgrades.

Fixes

Desktop

- 40226 Dragging and dropping an email from Outlook with attachments was throwing an encryption error when the "Use FIPS compliant algorithms" setting is set to True in group policy. This behaviour has been corrected.
- 40942 Some date/time email tags would cause an error to occur if the staff user and client user time zones in HelpMaster were different from the staff member's computer's time zone. This has been fixed.
- 41029 Skillgroups could not be deleted because the skillgroup supervisor couldn't be removed. This has been corrected.
- 41033 When opening entities (clients, sites, assets etc) with job history, the initial load was incorrectly loading too much information. Now, the screens will load much quicker and the job information will be loaded on demand.
- 41038 Attachment icons for parent/child jobs are not aligned and so previewing was being hindered by the +/- icons of the parent job. This has been fixed and the attachment column needs to be made wide enough to view both parent and child attachment icons.

Also made first click show the attachments list and second click will now close it instead of showing it again.
- 41040 It was possible to lock the Action template "Time Taken" option AND "User must update the Time taken...". The action then could never be completed using the action template. This has been corrected. Now they are mutually exclusive and are ignored for quick logging as there is no opportunity to update the time anyway.
- 41044 Merging 2 clients into one was not always preserving the asset links correctly. This behaviour has been corrected. Also, the concurrency resolution screen had a similar issue. Both have been fixed.
- 41047 On triggered event profile "Date Based" settings, the "Quick offset" button was overlapping the calendar control icon. This has been corrected.
- 41172 On the Desktop version, Administration > System Administration > Staff Licencing, the "Last Desktop log in" was not being correctly updated. Also the Client > Permissions tab "Last logon" was not being updated correctly. Both of these issues have been corrected.
- 41195 HelpMaster Desktop was either re-opening itself or causing a Windows error when being closed. This has been corrected.
- 41243 Workflow variables and SQL script objects were not escaping special characters correctly. This behaviour has been corrected.
- 41245 Email exclusion checkboxes on the Skillgroup screen may not have been checking/saving correctly. This behaviour has been corrected.
- 41273 Viewing your own Client screen was incorrectly showing "(No Timezone selected)" when the time zone is actually selected. This has been fixed.

HelpMaster 23.4.24.60

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Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v22.7.75.206
Database version 176.17

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Fixes

Desktop

41300 Updating a job could cause an unexpected error if an asset screen was currently open. This behaviour has been corrected.

Desktop & Web Portal

41144 Workflow objects that contain SQL / scripting now have options for how any date variables will be formatted when using in the script. Options include using UTC value, or local timezone value.

41264 The backslash character (\) was doubling up (\\) in Knowledge Base articles and other TinyMCE editor places due to being seen as a control character. This has been fixed.

Email Manager

41157 Improved error trapping for Email Manager processing for sending email to Skillgroup Supervisors.

41210 Email Manager "flood control" values may have been missing in the database. If missing, these will be set to default values in the next database update.

Web Portal

40987 When an action template "Assigned to" field was locked from Options (tab) > Security (section) > Assigned to (checkbox), it wasn't being locked on the web portal. This has been fixed now.

41218 Web Portal login options have been simplified. There are now "Remember me" checkboxes for regular login types (username/password), as well as Active Directory login and External oAuth2 login types. This has replaced and simplified some of the web options that are administered in the Desktop edition.

The option to use Windows username/password has been removed from the product.

41235 When using custom Action Template ordering for Job Templates (Options tab), the order of the Actions was not displaying correctly on the web portal. This has been fixed.

41242 When additional "Available Actions" are configured for a Job Template, the web portal would display incorrect details about a regular Action Template, if a custom "Available Action" was used before it due to a caching issue. This behaviour has been corrected.

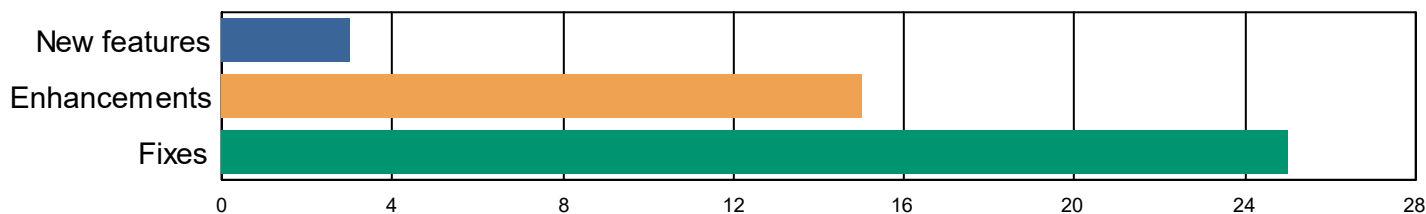
41265 Multiple pasted images names were not incrementing above 1. This has been fixed and they now increment correctly.

41267 When Entity Items were added from the web portal, they couldn't be viewed due to an error. This has been fixed.

41295 Clicking and holding up/down arrows for time when adding an action was causing them to scroll themselves up or down, and it was difficult to reset. This has been fixed.

Release summary

Total number of changes: 43



HelpMaster 22.7.75.206

Release date March 02, 2023
Release type Maintenance - Upgrade is recommended

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v22.7.22.153
Database version 175.28

Notes
This is a maintenance release. All modules of HelpMaster (desktop clients, Email Manager, Priority Manager, Active Directory, Web Portal) will need to be upgraded also.

Fixes

All HelpMaster Modules

41213 When linking clients to sites and sites to clients, the "Primary Entity" options was not always being set correctly for looking at the link in reverse order. This behaviour has been corrected.

Desktop

41199 The Job State field was not being re-loaded correctly in the Job Finder when viewing from a Saved Search, or Priority Manager profile. This behaviour has been corrected.

Email Manager

41159 Having a mix of Outlook/Exchange and Microsoft 365 Email Manager profiles was causing errors to occur and the Email Manager service to stop processing. This has been corrected and a mix of profiles work fine now.

Work around: Use only Outlook OR M365 profiles in older versions of HelpMaster. Do not mix.

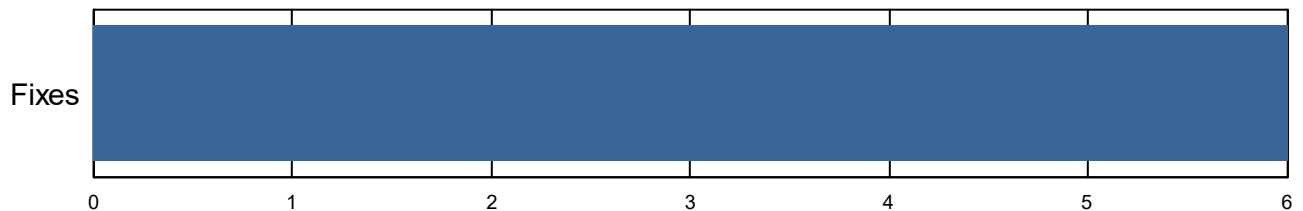
41163 Searching and selecting M365 and Google mailboxes and folders from Email Manager profiles was not working with the keyboard <Enter> and arrow buttons. This has been fixed and is now fully functional.

41171 Reselecting a profile's scan mailbox/folder was not replacing the existing scan mailbox/folder, if the name was the same, even though the stored folder ID was different. This has been fixed and now it will show a message stating that the mailbox ID was different and has been updated.

41188 Deleting an Email Manager profile may have caused a database referential integrity error. This behaviour has been corrected.

Release summary

Total number of changes: 6



HelpMaster 22.7.66.197

Release date December 15, 2022
Release type Maintenance - Upgrade is recommended

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v22.7.22.153
Database version 175.28

Notes
This is a maintenance release. All modules of HelpMaster (desktop clients, Email Manager, Priority Manager, Active Directory, Web Portal) will need to be upgraded also.

Fixes

Desktop

- 40858 While creating a new Client with default control sets and updating the values, adding another control set before saving would prevent one of the default control sets from saving its values. This has been fixed.
- 40896 Control set drop-down boxes were incorrectly displaying "(obsolete)" after values for closed jobs. This behaviour has been corrected.
- 40897 Job and Action Template "fall-back" and assignment value was being blanked out incorrectly when making changes to the templates. This behaviour has been corrected.
- 40908 Changing the Job Template when logging a new job would incorrectly state that "You have entered some text... do you want to keep this text?" when no text was entered or changed. This only occurred if the original job template had text entered in the Summary &/or Details that wasn't ticked as placeholder text and the force summary/details update options were disabled. This has been corrected and will no longer happen.
- 40919 Updating or creating a client may have shown a duplicate ClientID validation message due to a deleted user existing with the same ClientID. This has been corrected. Marked as deleted users will now have their ClientID changed to "Deleted<PKID>" and their previous ClientID will be stored along with a deletion date/time stamp. Active AD synched users will also be undeleted by the Active Directory service if it is running.
- 41030 System code "Groups" and "Feature Groups" were not sorting correctly. These will now sort according to the "Sort Order" saved, for each group, from system code administration.
- 41046 The Site "Core Business" system code "Description" field was not displaying in the tooltip box. This has been fixed.
- 41061 The Webview2 (Edge) control was creating a default "0" user data folder which was causing a conflict error when more than one user was logging in to HelpMaster, if the Desktop was being hosted in an RDS / Citrix / Parallels terminal server type environment. This has been corrected.

Desktop & Web Portal

- 40929 Powershell workflow scripts using date variables were failing due to invalid date formatting. This has been fixed.

Installer

- 40964 Removal of VC++ 2013 components was preventing the Database and Reports Wizard from being able to create new HelpMaster databases. This component has been re-added to the HelpMaster installer executables.

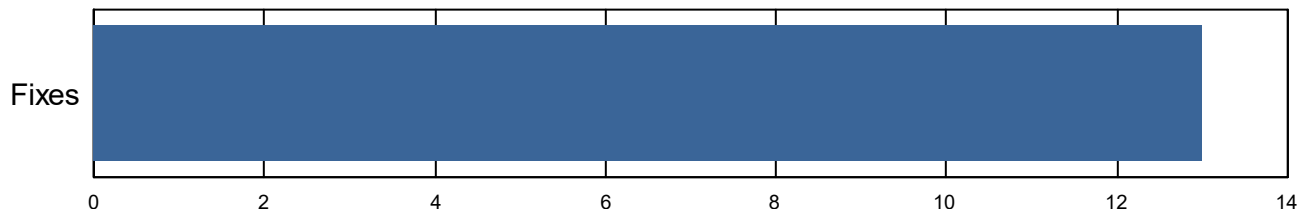
Web Portal

- 40910 Clients that do not have a timezone set will get a blank screen when logging onto the web portal. This has been corrected.
- 40944 Emails sent from HelpMaster running under a development license were not being formatted correctly.
- 41129 "Self Registration" for new users was not sending the confirmation email and registration via external authentication (Microsoft, Google, etc...) was not functioning. These issues have been fixed.

When using external authentication, only that method will allow login until the new user sets their password from "My Account > Password", then they can login via username and password. This password screen has been updated to cater for this also.

Release summary

Total number of changes: 13



HelpMaster 22.7.42.173

Release date September 16, 2022
Release type Maintenance - Upgrade is recommended

Database upgrade notes Required if upgrading from any version of HelpMaster prior to and including v22.7.26.157
Database version 175.28

Notes
This is a maintenance release. All modules of HelpMaster (desktop clients, Email Manager, Priority Manager, Active Directory, Web Portal) will need to be upgraded also.

Fixes

Desktop

- 40928 New date control time zone displayed was hard-coded to "Canberra, Melbourne, Sydney". This was only displaying incorrectly but was actually using the correct local or client set time zone. This has been corrected to display the local machine or Client user set time zone as it should.
- 40993 Merging two clients linked to the same job may cause an error due to having two primary clients. This has been corrected and only a single primary client will now ever be linked to a job.
- 41000 When using Job Finder and searching for control set "Checkbox" and "Tri-Choice" values, the values were being returned in boolean (1,0,NULL) rather than the human readable values. This has been fixed and now readable values will be returned to all locations.

Desktop & Web Portal

- 40950 Non "Client Web Enabled" control sets on a Job Template were not being added to the job at all if logged via the web portal. Staff web users also don't see it when they should. This has been fixed and client web users will not see these control sets but they will always be added to jobs and staff users will always see them now.

Email Manager

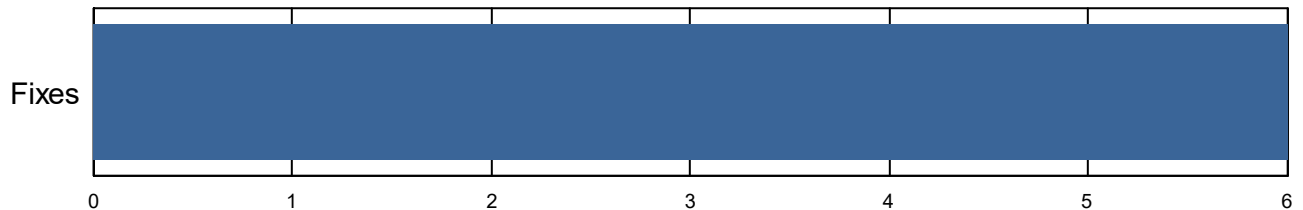
- 41060 The Email Manager profile option "Successfully Processed" (step) > "Job/Action" (section) > "Attach a copy of the Email to the Job or Action as an attachment" was failing to attach emails when Microsoft 365 mailboxes were in use, and would throw an error in the log. This has been corrected.

Web Portal

- 40986 The web portal didn't allow closing jobs without using an action template. This has been fixed and jobs can now be closed using a blank action by just selecting the "Closed" job status.

Release summary

Total number of changes: 6



HelpMaster 22.7.22.153

Release date July 22, 2022

Release type Feature update release. Upgrade is recommended-

Database upgrade notes Required if upgrading from any version of HelpMaster

Database version 175.27

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

New features

Desktop & Web Portal

40571 Added a new "whole" number control set field and fixed the use of negative numbers.

40792 Added the ability to grant Client users (Site Managers) access to all jobs associated with the Site (and child Sites) they belong to. This is enabled from the relevant Site's "Links" tab by right clicking on the user(s) you want to grant Site wide job viewing and selecting the "Grant site wide job visibility" option which will display a Site/Client type icon to distinguish this elevated access. This can be enabled from either the Desktop or Web Portal by any privileged Staff user.

Job visibility will include any jobs logged to any user belonging to the same site, any job the Site is linked to whether primary or not, any job where the primary client belongs to the same site, as well as any of the preceding conditions on any child site below the hierarchy of the site granted access to. To grant Client access to any other jobs without a Site relationship, the Client must be added as a link to the job and the related new feature of Job # 40782 will apply.

Web Portal

40508 Added the "Links" tab to all available entities with similar functionality to the Desktop's, including quick pick entity selectors, multiple link collections "Add" button. Child job linking, ordering, validation, security and promotion. Ability to open any linked entities in the existing or new tab using the <Ctrl> key or with the right click mouse context menu.

Desktop option in Job Template's to hide the "Links" tab while the job is being logged, and also hiding of Asset, Site, and Client selectors when logging new jobs.

Added the ability to "Inherit" a linked Site address from any Client entity.

40578 Added main Asset management capabilities to the web portal.

Enhancements

All HelpMaster Modules

40823 Update Microsoft Outlook emailing components to latest version 6.2.0.6122.

Database

40533 The sample and blank databases have been updated for cleaner content. Both databases have better HTML formatting for email templates, knowledge base article and other objects. The sample database has better sample data, new request catalogs and more.

Desktop

40501 Updated the HelpMaster Outlook Redemption messaging components to the latest version 6.1.0.6054.

40583 Asset and Control Set currency fields couldn't be blank (NULL) values, but always displayed \$0.00. New .Net functionality now allows blank fields and these have now been updated.

40591 Adding an Entity Item to an Asset was difficult to figure out. We have changed the screen layout to a standard toolbar layout and the Entity Items are now added when selected from a list.

40638 Custom drop-down boxes were not drawing with the correct Windows 11 theme. This behaviour has been corrected.

40876 Email Manager client options for "Update" profiles has been improved with greater customisation of client options, security improvements and fix several issues. Clients options for update profiles have been moved from the Global Options to per-profile for even greater configuration possibilities.

40877 Added the ability to resolve concurrency conflicts for Job, Action, and Email Template entities the same as it does for Jobs, Sites, Clients, and Assets.

Desktop & Web Portal

40538 Added a placeholder text option in workflow for Action Templates to be actioned. This workflow text will replace any text already in the action template, whether placeholder text or not. Workflow variables will also work with this new feature.

40600 When the HTML Images working folder location was either not set or invalid the HelpMaster Desktop and the Web Portal would both show an error. This has been fixed and they will now both show a warning that the HTML Images path has either not been set or is pointing to an invalid path.

40619 Added a "Job History" recents list showing the last 15 jobs viewed from either the Desktop or the Web Portal. Improved the way that jobs are saved so that now the Desktop and Web recents lists are instantly synchronized when a job is viewed.
Note: A database patch to the latest version is required for this change.

HelpMaster 22.7.22.153

Release date July 22, 2022

Release type Feature update release. Upgrade is recommended-

Database upgrade notes Required if upgrading from any version of HelpMaster

Database version 175.27

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

Enhancements

Desktop & Web Portal

40773 Created new date/time control with more friendly date and time selectors. Removed all traces of the previous third party date/time control from HelpMaster.

40782 Added the option to allow non-primary clients linked to jobs, to view and update them from the web portal. This option may be enabled from the Desktop at "Administration" (menu) > "System administration" (menu) > "General" (tab) > Global Options (section) by enabling the checkbox labelled "Allow linked Clients to view Jobs through the web portal".

Once enabled Staff users may also grant/revoke linked Client access by right clicking and selecting the "Revoke Client Job visibility" / "Grant Client Job visibility" option from either the Desktop or Web Portal's "Links" tab of each Job.

Email Manager

40701 Updated wording on some message boxes for Email Manager parsers.

40707 Google API email accounts can now be used with Email Manager profiles with full user email account searching functionality. Creating Global Email Accounts will also utilise the new user email account searching capabilities.

40712 Added the ability for Email Manager to send any Email Template to the sender as an auto-reply with "Move Only" Email Manager templates.

40802 Email Manager will now identify and strip out any signature blocks from the body of emails. What was removed can be viewed from the job in the HelpMaster Desktop by clicking the "View excluded details" hyperlink next to the job details field.

Reports

40705 The HelpMaster PowerBI dashboard has been updated to include a feedback tab which has a great Wordcloud and other feedback stats.

40821 Updated SAP Crystal Reports Runtime to service pack 32.

40842 The Top-level issue report formula for "Undefined" codes was chopping off the last ">". This behaviour has been corrected. Also updated border colour on many reports to a Grey border instead of Black, for consistency.

Web Portal

40530 Added the job number search field to the main header so that it is accessible from any web portal page.

40584 File attachments support has been improved for the web portal. Uploading, copy/paste, renaming, viewing, downloading and removing attachments has been improved.

40627 The home page for staff will now display the last 5 jobs that have been updated that are currently assigned to the logged in staff member. This is a change from the previous way, where it was displaying the last 5 jobs that the staff member had personally logged, and was the primary client for. This should help staff manage their job queue better by displaying recently updated jobs. Also, the "See all" button has been replaced with a "Explorer" button which will display the explorer screen for that staff member. Client logins will behave as normal.

40632 Added "Client History", "Site History", and "Asset History" recent lists to each entity to show the last 15 viewed or created entities in each. These recent lists dynamically update between the HelpMaster Web Portal and Desktop application.

40776 Drop-down boxes on the web portal now open when clicked anywhere on the box. Previously you had to click on the down arrow on the right. Also improved keyboard support and general use of web-based drop-down boxes.

40826 From the web portal there was no option to delete addresses from clients and sites. Also address changes were not saving properly. These issues have been fixed and a "Delete" button has been added to the "Edit Address" dialogue box.

Fixes

Active Directory Module

40531 Unassociating clients from Active Directory was not fully removing all of the sync data. The SAM account was being left in the database and still displaying on the client record. This behaviour has been corrected.

Database & Reports Wizard

40534 Some minor UI updates. Add version number to start screen. Change button label to say "Upgrading..." when pressed. Updated SQL authentication choice to specifically mention "SQL Server account", rather than just "User account" to avoid confusion with regular domain accounts instead of SQL Server accounts.

Desktop

40527 The workflow User Multiple Choice "Add Option" button didn't look right when hovering the mouse over it. This has been fixed.

40532 Reworded / improved several message boxes for Job Template configuration options for "web forms" and validation messages.

HelpMaster 22.7.22.153

Release date July 22, 2022

Release type Feature update release. Upgrade is recommended-

Database upgrade notes Required if upgrading from any version of HelpMaster

Database version 175.27

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

Fixes

Desktop

- 40535 Creating Child jobs from Workflow on an existing Child job was causing errors when the new job was opened. This was because a Child job cannot have it's own Child job. This has been fixed and in this case the two Child jobs will revert to a standard link to each other eliminating the error.
- 40572 Deleting a Staff member was not removing skillgroup and security settings for the user which may have allowed skillgroup emails to be sent even after deletion. This has been fixed.
- 40592 Using the <Delete> key to to remove currency values from any entity was causing an error to occur. This has been fixed.
- 40694 The Purge job function has been improved to work with larger sets of data. Previously it may have caused a database timeout error. This behaviour has been corrected.
- 40729 Selecting an "Issue" (problem code) from Job Finder, Jobs, and Email Manager Issue Modifiers required characters to be entered or removed before the Issue tree hierarchy would be displayed. We have now added a pseudo drop-down arrow which will show the hierarchy without having to enter or remove any characters first.
- 40760 IMAP/SMTP Global Email Accounts couldn't be deleted when replaced by another account type in Email Manager profiles. This has been fixed.
- 40766 The isDirty flag was not being set correctly when changes were made to the global options in the Priority Manager. This behaviour has been corrected.
- 40815 Changing the RSS Feeds Addin url and clicking "Reload", was not reloading the RSS Feeds docked window and so the new feed was not being displayed. This has been fixed and will now update the docked window also.
- 40829 Client merge has been updated to include merging of job summary, client feature group & web license, site feature group, asset barcodes, KB featured articles, and control set values that previously weren't included. Fixed an error that occurred during merging, due to the new date control. Also updated the related concurrency conflict resolver.

Desktop & Web Portal

- 40599 Entity Item number/currency/decimal controls allowed input to exceed the maximum range causing an error to be thrown. Also, Firefox browser was not pasting data via the context menu. Other minor text-based entry issues were also corrected.

Email Manager

- 40711 If a Email Manager profile was previously configured as a "Log Job", or "Update Job", and then switched to a "Move" profile, the original email folders that were configured were causing the validation to throw errors when the profile was saved. This has been fixed.
- 40819 Email Manager and Triggered Event logged jobs were not notifying the person or skillgroup persons assigned the jobs on their notification panel. Also Knowledge Base article updates from the web portal were not triggering notifications either. All of these issues have now been coded to trigger the necessary notifications.

Installer

- 40613 When installing individual components of the HelpMaster product suit, all of the .config files were being deployed instead of just the corresponding file. This has been corrected.

Job Monitor

- 40523 Job Monitor icon styling updated and the default HelpMaster Desktop file name changed to the new "HelpMaster.Desktop.exe" name.

Reports

- 40575 When running reports, the filter text was incorrectly being display as raw HTML. This text will now display in regular text.

Web Portal

- 40543
 1. Images were not able to be pasted from Word documents,
 2. Pasting to the "Attachments" job tab was failing after adding the in-line attachments view,
 3. Images were not displaying in the order that they were added for sequencing.All of these issues have been resolved.
- 40550 The knowledge base article detail page on the web was incorrectly displaying a ">" character before the "Applies to" section. This behaviour has been corrected.
- 40579 Renaming attachments on the web portal has been improved.
- 40763 When adding an action and sending email from the web portal, the CC clients were not receiving email. This has been fixed.
- 40822 Workflow with one action immediately after another action was causing the workflow to snag on the second action. The "Run Now" button was unresponsive until the page was refreshed. This has been fixed.
- 40860 If an action log entry was displaying an image, adding a new action was re-populating the action log, but hiding the image. This has been corrected - the images preview will continue to display after adding a new action log entry.

HelpMaster 22.7.22.153

Release date July 22, 2022

Release type Feature update release. Upgrade is recommended-

Database upgrade notes Required if upgrading from any version of HelpMaster

Database version 175.27

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

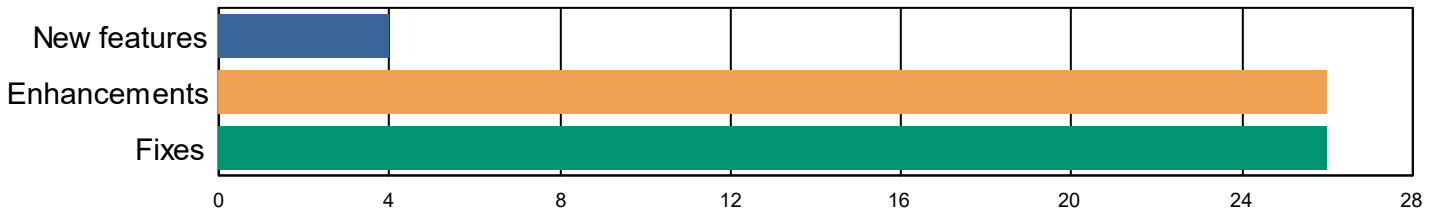
Fixes

Web Portal

40880 The "Job History" tab for clients, sites and assets on the web portal now has a "Logged by / Date Logged" dual column to display this information.

Release summary

Total number of changes: 56



HelpMaster 22.2.45.58

Release date June 17, 2022

Release type Maintenance - Upgrade is recommended

Database upgrade notes Required if upgrading from any version of HelpMaster

Database version 175.99

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

Fixes

Desktop

- 40414 Clicking the SQL syntax check button when doing an "SQL Based" "Entity Search" was throwing an error on Entity based Triggered Event Profiles. This has been fixed.
- 40783 The Email Manager was leaving some HTML elements (hyperlink text / embedded content CID tags etc.) when converting email into job and updates. This behaviour has been corrected.

Email Manager

- 40785 Fixed and improved many aspects of the Email Manager logging and verbose logging. Logging is now faster, more database/disk-space friendly and better content for the logging. Verbose logs are now stored in a separate database table that is automatically truncated each day. This improved database performance and eases pressure on the database transaction log file, saving disk-space and processing resources.

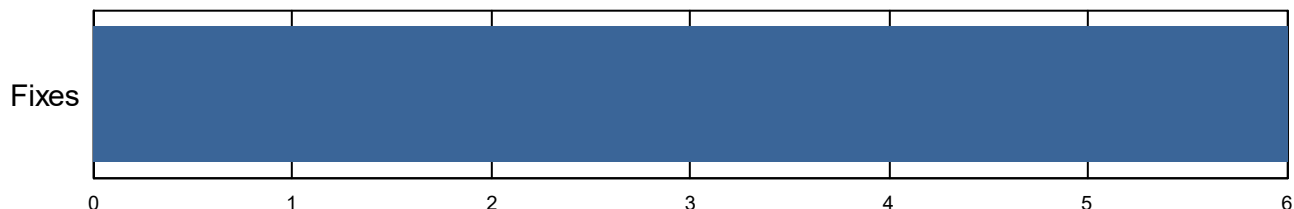
New options are also available in the event logging configuration for what type of log is written.

Web Portal

- 40490 The "Required Fields" on Action templates were not being implemented correctly for the web portal. If an Action Template was configured to have pre-filled in text, the web portal still required a change to be made before being able to save. Several other minor issues were also corrected.
- 40805 Updating clients, sites, assets and jobs via the web portal may have caused a save/validation issue. This behaviour has been corrected.
- 40816 If using an Action template on the web portal that has been configured to lock the details field, the web validation was prompting for a value to be entered, which was not possible because the field was locked. This behaviour has been corrected. Several other minor issues like this were also fixed.

Release summary

Total number of changes: 6



HelpMaster 22.2.38.51

Release date June 07, 2022

Release type Maintenance - Upgrade is recommended

Database upgrade notes No patch required if upgrading from any previous version of v22.

Database version 175

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

Enhancements

Desktop & Web Portal

40752 Date columns and controls now have better support for long-date formats as per computer regional settings.

Fixes

Desktop

- 38017 Priority Manager search criteria for flags, workflow and feedback were not saving correctly. This behaviour has been corrected.
- 40519 Clicking the "Auto-fix" (HTML) button on Web Settings > Web Display Messages > Contact Details caused an error if there were 2 or more of the same contact images displayed. This has been fixed.
- 40642 When creating an M365 email account, HelpMaster would throw an error if the account selected was unlicensed or didn't have an email address. This has been fixed.
- 40644 Edit and Delete buttons were not displaying on Message Board items if only a single message is displayed. This has been fixed.
- 40662 When viewing the "User Preferences" screen, any open and unpinned Action screens couldn't be viewed until the "User Preferences" screen was closed. This has been resolved.
- 40663 Entity Item - drop-down custom stored procedures were not populating via the Desktop edition of HelpMaster. Also, the Entity Item administration/design for drop-down / custom stored procedure UI was not displaying the field for the custom stored procedure correctly. This behaviour has been corrected.
- 40674 Creating a new asset may have caused an unexpected error / SQL timeout error. This behaviour has been corrected.
- 40692 Viewing an email that was sent as part of a re-assign action to a Skillgroup where all members of that group received the email would produce an unexpected error. This behaviour has been corrected.
- 40733 If the workflow object "Set variable by user input" was configured to input a date value, leaving the date-picker on-screen for too long would cause an unexpected error. This was due to an async issue with the WebView2 control. This behaviour has been corrected.
- 40743 Typing an invalid job number into the main toolbar "Job #" box would cause a crash. This behaviour has been corrected.
- 40744 Powershell script workflow objects were not being validated correctly, and may have reported a SQL validation message instead. This behaviour has been corrected.
- 40747 Change Management templates with pre-defined skillgroup(s) for the voting would throw an unexpected error when used to create a new RFC. This behaviour has been corrected.
- 40775 When using the Action screen and toggling between "All action templates" and "All subscribed templates" in the template drop-down box, it may have caused a system crash. This behaviour has been corrected. Desktop version only.
- 40781 The "Search results" screen was not displaying the full range of flags in the "Set flag" menu. This behaviour has been corrected.

Desktop & Web Portal

- 40643 The notification panel will now display a notice when an unassigned job receives job feedback. Also a minor tidy-up of display HTML and wording.
- 40774 Jobs and Change Requests with very long summary fields would cause the notification dock panel windows to throw an unexpected error when an action, or a new vote was made. This behaviour has been corrected.

Email Manager

- 40714 Email Manager "Move email" profiles can now be configured with a "Failed" folder. This was missing previously and caused an unexpected error if a blacklisted email or domain was processed. This behaviour has been corrected.

Reports

- 40709 Minor formatting update for some reports.

Web Portal

- 40677 Setting a variable from a Control Set field and using it in a Common Task was failing to execute from the web portal and the variable wasn't being retained in the Desktop. This has been fixed.
- 40732 In some circumstances, the web portal workflow multiple-choice box was incorrectly showing a value already set when it should not have been. This would only happen if the workflow contained several multi-choice boxes. This behaviour has been corrected.
- 40734 The client text (underneath their image) on the web portal was not displaying correctly when clients only have a first name. This has been corrected.
- 40746 Workflow variables were not being displayed correctly in a workflow break object. This behaviour has been corrected.
- 40764 The logon process for the web portal has been updated to correct issues.

HelpMaster 22.2.38.51

Release date June 07, 2022

Release type Maintenance - Upgrade is recommended

Database upgrade notes No patch required if upgrading from any previous version of v22.

Database version 175

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

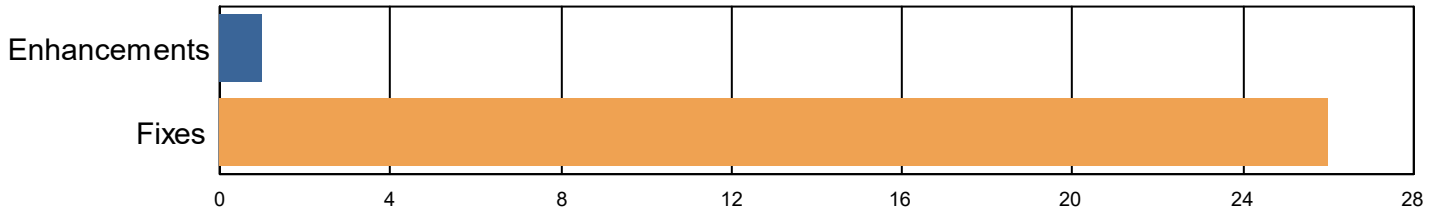
Fixes

Web Portal

- 40769 Inheriting an address from a site that doesn't have an address would cause an unexpected error. Web Portal only. This behaviour has been corrected.
- 40780 Sending email via the web portal (Change Management voting, workflow etc) may have caused an unexpected error. The email code now has better support for async conditions, and the incorrect behaviour has been corrected.
- 40797 The web portal may have incorrectly displayed a "private" watermark against an image that was attached to a job. This behaviour has been corrected.

Release summary

Total number of changes: 27



HelpMaster 22.2.23.36

Release date February 22, 2022

Release type Maintenance - Upgrade is recommended

Database upgrade notes No patch required if upgrading from any previous version of v22.

Database version 174

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

Fixes

Desktop

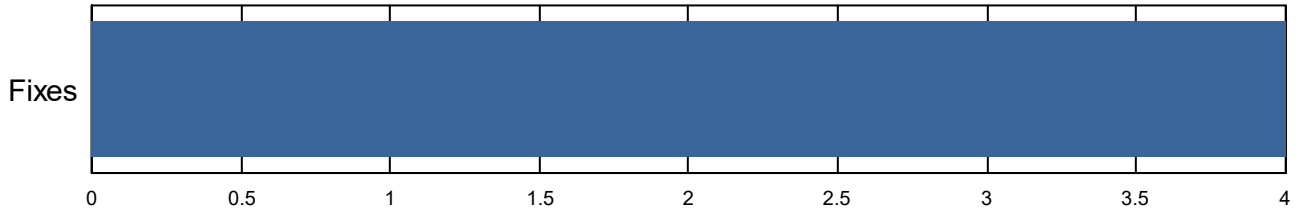
- 40596 The Workflow item "Update Control Set Validation" would give an error if the control set was not already added to, or was removed from the job. This will now give a friendly message stating that the control set is missing from the job and needs to be added.
- 40610 Modifying an existing Triggered Event Profile may cause a validation error. This has been fixed.
- 40621 Updating the time zone or business hours from "Administration" (ribbon) > "System Administration" (icon) > "Business Hours" (tab) may cause an error to occur. This has been fixed.

Desktop & Web Portal

- 40615 Workflow approvals that had missing or invalid email template links would throw an unexpected error. This behaviour has been corrected.

Release summary

Total number of changes: 4



HelpMaster 22.0.12.15

Release date February 07, 2022

Release type Maintenance - Upgrade is recommended

Database upgrade notes No patch required if upgrading from any previous version of v22.

Database version 175

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

Fixes

Desktop

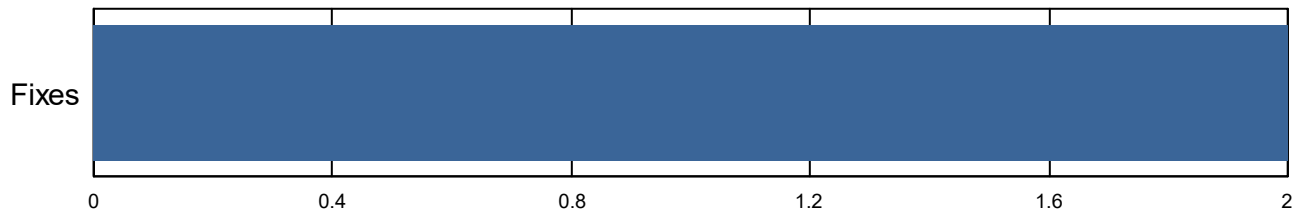
40559 Merging more than 2 clients was causing an error to occur. This has been fixed.

Web Portal

40604 Auto-complete web form settings in Chrome were not working correctly with some control-set fields on the web, preventing these fields from being updated. This behaviour has been corrected.

Release summary

Total number of changes: 2



HelpMaster 22.0.8.11

Release date December 23, 2021

Release type Maintenance - Upgrade is recommended

Database upgrade notes No patch required if upgrading from any previous version of v22.

Database version 175

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

Fixes

Email Manager

- 40549 When creating Email Manager profiles the first "Scan folders" page was not being displayed when using Outlook profiles. Instead the IMAP "Scan Account" was always showing. This has been fixed. For versions prior to 22.0.8 double clicking "Scan Account" would then show the correct "Scan folders" page.

Installer

- 40494 The HelpMaster installer was incorrectly installing the .net core hosting bundle when only desktop components were selected to be installed. The .net core hosting bundle will now only be installed when all components are selected, or the web portal.

Also fixed a minor inconsistency in the screen display sequence being displayed out of order if using the "back" button.

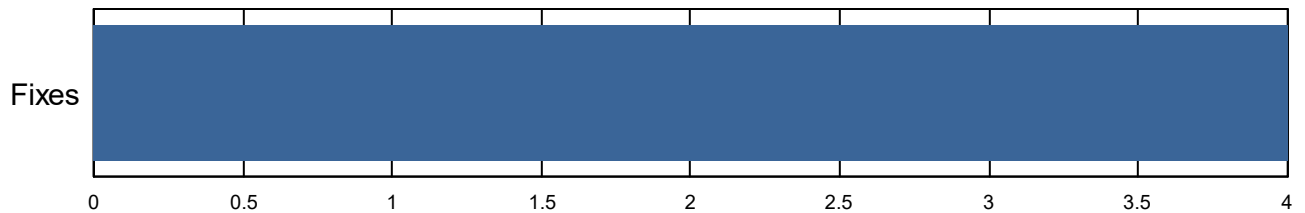
- 40502 Installer. Fixed the display order sequence of some of the screens in the installer.

Web Portal

- 40491 Attachments were not showing for Client web logins, only for Staff logins. This has been fixed and Clients can now also view attachments if they are not marked as private.

Release summary

Total number of changes: 4



HelpMaster 22.0.1.4

Release date November 25, 2021
Release type New major version of HelpMaster + many enhancements and fixes.
Database upgrade notes Required if upgrading from any version of HelpMaster
Database version 175
Notes
See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

New features

Desktop

- 40411 Job Finder: Added a new "Product Type" search tab and moved the previous "Product Type" search from the "Other" tab to this new one. Also added searching based on the Job Template, the Email Manager profile, and the Triggered Event profile used to log jobs. This also applies to Priority Manager search criteria and Saved Searches for both the Desktop and web portal wherever Job Finder is used.
- 40415 Now that the Job Finder can search for jobs based on what job template was used to log the job, or which HelpMaster module (Email Manager, Triggered Events) was used, or which entity has a control set, the "Properties" or "Dependency" tabs now include a button to open the Job Finder and automatically search for such jobs/entities. This is a handy feature to better understand how and what is logging jobs, as well as understanding which templates and profiles are being used..or not.

Desktop & Web Portal

- 40385 A new workflow object is now available for setting the value of a field in a control set. This is very useful in workflow and process flows where the values in a control set can change based on variables, user input, scripts or other factors.
- 40465 Control set client and site pickers can now be populated from a custom database stored procedure. This allows great flexibility to create pickers for almost any workflow situation.

Web Portal

- 40470 Added the ability to paste copied images to all entities via the "Attachments" tab and while logging new jobs and adding actions. Use the "Click here to Paste an image (CTRL+V or paste in context menu)" area to paste an image in.

Enhancements

All HelpMaster Modules

- 40359 Upgraded Outlook emailing components to latest version to improve features, stability and performance.

Desktop

- 40273 Added a "Full Screen" tool to the new Tiny MCE editor's toolbar.
- 40279 Removed hard-coded styling from dynamically generated hyperlinks within Email Templates. The generated hyperlinks will now inherit the styling of the paragraph they are in.
- 40282 Added a red warning label to indicate when old style HTML from the old TxText control hasn't been updated to the new Tiny MCE HTML style. This will appear for any entities using the new Tiny MCE HTML control including Email Templates, Knowledge Base articles, Job Logged Message on Job Templates, and Web Portal Settings messages.
- 40286 Job Finder filter summary results have been updated from RTF to HTML.
- 40314 .pdf attachment previewing is now handled by the Microsoft Edge WebView 2 control for a better experience, replacing the old Telerik preview control.
- 40319 Improved the job access restriction messages by making them more specific and indicating the exact restriction preventing access. e.g. "You do not have permission to add Actions to Jobs in another Staff members Job queue for this Skillgroup."
- 40371 Workflow: Variables dock improvements have been implemented to display any changes to variables immediately in the preview pane. Also added the new multiline variable option and fixed the carriage return <CR> to start a new line instead of closing the edit screen.
- 40390 Added the ability to remove Action attachments from the Job's "Attachments" tab. Now the Action doesn't have to be opened to remove these attachments. This now aligns with the Web Portal functionality.
- 40413 All textboxes that allows custom SQL to be entered will now check the syntax of the SQL and provide warnings if the context is incorrect (eg. Using UPDATE instead of SELECT), as well as warning if a WHERE clause is missing, or no HelpMaster tags are being used. This will help custom SQL configuration to be easier and safer.
- 40424 Deleting a variable value from Workflow was not easily done, This was a programming oversight. All variable types can now be cleared by using "Set/Modify a variable" and selecting the "())CLR" option.
- 40429 Updated the WebView2 control to the latest build.
- 40469 Added the ability to set a default change request template from "Administration" (ribbon) > "System administration" (icon) > "Default Templates" (panel). Created a "New Change Request" section in the "Change" ribbon toolbar to utilize the new default template. Also added a new "Blank Change" icon.

Desktop & Web Portal

- 40176 Multiple Action Email Tags have been changed to display Actions ordered by newest to oldest in line with a standard email trail. The following tags are affected, <<Action_AllPublicActions_FullInfo>>, <<Action_AllPublicActions_FullInfo_NoCostOrTime>>, <<Action_AllActions_FullInfo>>, <<Action_AllActions_FullInfo_NoCostOrTime>>.
- 40301 Job flagging and "mark as read" actions will now follow Job Security Role permissions as intended.

HelpMaster 22.0.1.4

Release date November 25, 2021

Release type New major version of HelpMaster + many enhancements and fixes.

Database upgrade notes Required if upgrading from any version of HelpMaster

Database version 175

Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

Enhancements

Desktop & Web Portal

- 40351 Enhanced the Job Security Role settings as follows;
1. Previously the "Adding Actions" option restricted the updating of own actions already added. This option will no longer limit the ability to update your own Actions if you have permissions to view the job,
 2. Added a new "Update other peoples actions" to allow or restrict updating other peoples Actions. Previously the "Adding Actions" option was the only way to allow or restrict this ability but then you couldn't add actions at all.
- 40361 String variables in workflow now support multi-line. This is useful for storing, or setting text values that span over multiple lines. A new "multi-line" checkbox will activate a larger text box to see/enter text.
- 40378 The Control Set "date" data type has been split into 3 separate fields, rather than using a configuration property on the "date" field. The options are:
- Date + Time
Date only
Time only
- This will improve ease of use, configuration, reporting and internal data structure.
- 40408 "Add Action", "Log Job", and "Show a control set to the user" Workflow items can now be used as the last item in workflow even with "Add cancelled action path" enabled. The cancel action path must be linked and then the item can be used to complete the workflow. Previously this was not possible.
- 40431 Upgraded MailBee email components from 12.2 to 12.3.
- 40438 Added a new Email Tag <<Action_LastClientOrStaffPublicAction_DetailsOnly>> as the original related tag was sending the last action's private action details also.

Email Manager

- 40281 Improved Email Manager service logging as follows...
1. Removed unnecessary log entries and improved log information,
 2. Added which profile, email, and job number to every log entry possible,
 3. Added more filtering options including filtering by Email Manager Profiles,
 4. Added a "Profile Event Logs" tab to Email Manager Profiles for targeted logging.
- 40302 Email Manager verbose logging has been simplified and improved as follows...
1. 1 month's worth of verbose logs will be stored in the HelpMaster database and anything older is deleted,
 2. Selecting a standard log entry and clicking the "Load verbose logs" button will load 100 verbose logs before and after the selected item,
 3. Verbose logs can now be filtered on individual Email Manager Profiles both from the main Event Log screen and also from the profile's "Profile Event Logs" tab while viewing any profile's configuration.

Priority Manager

- 40212 A number of email tags were not populating when contained in templates selected from the "Send Email" only section of Priority Manager. They previously required an action to be added so as to work. This has been changed so that now the following email tags will populate in this instance;
- ```
<<Action_AllActions_FullInfo>>
<<Action_AllPublicActions_FullInfo>>
<<Action_AllActions_FullInfo_NoCostOrTime>>
<<Action_AllPublicActions_FullInfo_NoCostOrTime>>
<<Action_LastClientAction_DetailsOnly>>
<<Action_LastStaffAction_DetailsOnly>>
<<Action_LastClientOrStaffAction_DetailsOnly>>
<<Action_LastStaffAction_AwaitingClientResponse_DetailsOnly>>
<<Action_LastStaffAction_LastPublicAction_DetailsOnly>>
```

### Web Portal

- 40271 The "Timeline" tab now appears on the job screen on the web portal similar to the desktop. This tab displays date and time information about the job.
- 40272 Added new "Contact Type" drop-down column filter, set all date filters to "Equals" as the default instead of "After". Also set "Job Type", "Priority", and "Job Status" filters to drop-downs so that only actual System Codes may be selected.
- 40274 When there are no attachments present, a "No Attachments" place holder is now visible when viewing the Attachments tab for Jobs, Knowledge Base Articles, Clients, or Sites from the web portal.
- 40276 Security has been added to be able to restrict some Staff users from creating or editing Knowledge Base articles from the web portal.

# HelpMaster 22.0.1.4

**Release date** November 25, 2021

**Release type** New major version of HelpMaster + many enhancements and fixes.

**Database upgrade notes** Required if upgrading from any version of HelpMaster

**Database version** 175

## Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

## Enhancements

### Web Portal

- 40280 Added the ability to add and remove job flags from the web portal.
- 40300 Changed behaviour of viewing jobs from the web portal. Previously clicking anywhere on the job would open the job for viewing, now it must be double-clicked or the job number hyperlink clicked to open and view. This is in order to be able to multiple select jobs, to right-click for context menu access, and for future development of such features.
- 40305 Added the ability to mark jobs as "Read" or "Unread" to the web portal for Staff logins. This will also follow the Job Security Role permissions as in the Desktop application.
- 40306 In the Explorer navigation bar, changed the cursor from a text cursor to the web selection hand pointer cursor.
- 40312 Explorer navigation will reset full text search terms just as the Desktop does now.
- 40313 Added the "Quick re-assign Job to me" right click option to unassigned queues from the web portal Explorer.
- 40316 Added full Job Security Role sub-settings to the web. Previously only the main settings were being applied. Now it will match the Desktop access settings.
- 40344 Editing existing actions via the web portal has been improved to allow a simple edit, audit log, and attachment viewing.
- 40423 Security enhancements;
  1. Changed the Action checkbox label "Private (Staff viewing only)" to "Private Internal Note" which now also may prevent the Staff user from viewing private notes depending on security settings.
  2. Removed Application Security Role section "Staff access to jobs they have logged" from the "Job Security" tab and the default is now "No Access". The idea is if a Staff user logs a job on behalf of someone else, it doesn't automatically give them the right to see it. By default, the primary client (even if a Staff user) can always see their jobs.
  3. Added the option to "Allow Staff to always see private actions for Jobs where they are the primary Client. (legacy)". This is a new override setting for Staff users who are the primary client.
  4. Removed the "Jobs logged by me" queue from the Web Portal. Updated code to hide jobs from saved searches, job queues etc.. based on the above changes.
- 40437 Added a global option to attempt Active Directory login regardless of the page being browsed to excluding only ../KnowledgeBase for public access. The new checkbox setting can be found at "Web" (toolbar) > "Web Settings" (icon) > "Web Logins" (tab) and is labelled "Automatic Active Directory login (all users are on the domain and AD synced)". Without the new option enabled, default behaviour has been changed so that only browsing to ../winlogin will effect an AD login. All other web portal urls will require a login.
- 40446 Added a "+" icon to expand the Job Details text box to fit all text. It will only appear if there is enough text to show a scroll bar. Clicking it will change the icon to "-" for collapsing the text box back to default size.

Increased the log new job details from 6 to 10 rows and new action details from 4 to 8 rows by default. All text boxes can still be stretched by dragging down the two angled lines in the bottom right hand corner of text boxes.
- 40467 Web Portal job attachments now display additional information to display whether the attachment was linked to a job or an action, as well as who linked the attachment, and the date of the linking.

## Fixes

### Desktop

- 40299 Using custom dates to filter the new Email Manager logs was causing an error. This has been fixed.
- 40433 Clicking the "Close" button or opening an action on a job, before it has fully loaded was causing an error to occur. This has been fixed.
- 40471 Using the "Fix HTML" button on a Request Catalog with embedded images would cause an unexpected error. This behaviour has been corrected.
- 40482 The workflow preview in the Workflow templates was using a bold font, rather than a regular font. This behaviour has been corrected.

### Desktop & Web Portal

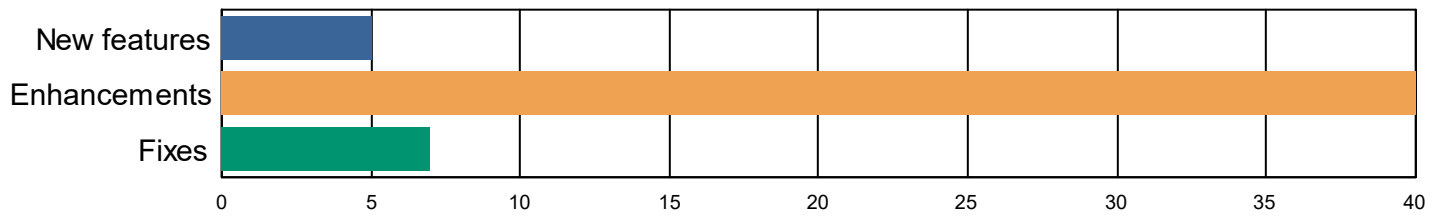
- 40427 Fixed several issues with setting the value of a client/site control set field based on a variable.

### Web Portal

- 40434 After showing a password control set value using the unlock button, clicking elsewhere was leaving the password visible. Now when changing focus the password will hide itself again.
- 40457 Changed behaviour so that secure pages (eg. ../explorer) will always go to the login page if not already logged in, except for the "../winlogin" suffix if AD login is configured. Browsing to any secure page will now present the login screen and redirect to the original destination after logging in.

## Release summary

Total number of changes: 52



# HelpMaster 21.5.67.53

**Release date** November 30, 2021

**Release type** Maintenance - Upgrade is recommended

**Database upgrade notes** No patch required if upgrading from any previous version of v22.

**Database version** 174

## Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v22/> for highlights

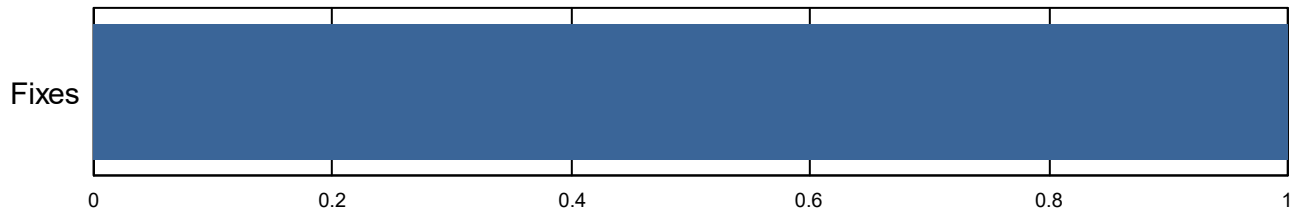
## Fixes

### Desktop

40496 Deleting Job or Action Templates may have caused errors. This has been fixed.

## Release summary

**Total number of changes: 1**



# HelpMaster 21.5.66.52

**Release date** November 25, 2021

**Release type** Maintenance - Upgrade is recommended

**Database upgrade notes** Required if upgrading from any version of HelpMaster

**Database version** 174

## Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v21> for highlights

## Fixes

### Desktop

40197 Dismissing a reminder may cause an error in rare circumstances. This has been fixed.

### Desktop & Web Portal

40398 Removing more than one Action attachment from the Job attachments tab may cause an error. This has been fixed.

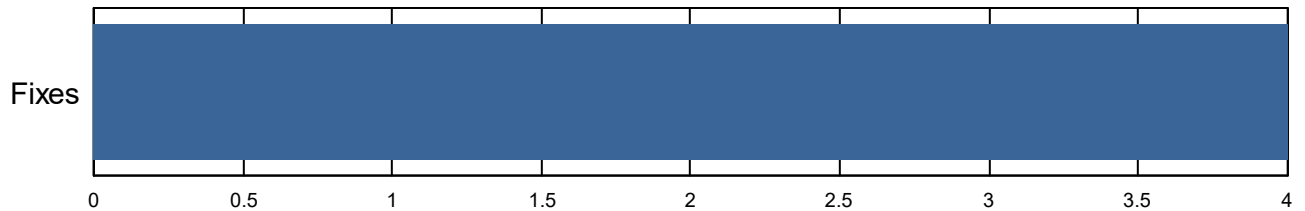
### Web Portal

40391 Running Workflow was not refreshing the job as changes were being made. Had to manually refresh the job page to see the changes, Actions added, control set updates, etc. This has been fixed and most changes will now refresh immediately, except for special items like Web API scripts.

40428 Sometimes a workflow "Break" was not being observed after a series of silent workflow items. This has been fixed.

## Release summary

**Total number of changes: 4**



# HelpMaster 21.5.62.48

**Release date** September 22, 2021  
**Release type** Maintenance - Upgrade is recommended

**Database upgrade notes** Required if upgrading from any version of HelpMaster  
**Database version** 174

**Notes**  
See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v21> for highlights

## Fixes

### Desktop

- 40336 Control Set drop-downs with (Collection) items was not showing any changes to the collection on the preview screen. This has been fixed.
- 40339 Workflow Decision: The "Store Decision Result in a Variable" checkbox once enabled would not allow it to be disabled again. This has been fixed.
- 40355 An error may occur when applying more than one change to an Action without closing it first. This has been fixed.
- 40370 When editing a closed job some Control Set items wouldn't allow changes while other did. This has been fixed.
- 40372 Selecting clients or sites from a control set client/site field was not displaying the information correctly if selected via the search or site hierarchy screens. This behaviour has been corrected.
- 40376 Linking a job template to a change template in either the "Implementation", or "Review" phases would throw an unexpected error. This behaviour has been corrected.
- 40381 Fixed a display issue where saved search descriptions involving control set date fields were displaying the date value in UTC, rather than the actual value. Note that this was a display issue only - the actual search was correct and returns correct values.

### Desktop & Web Portal

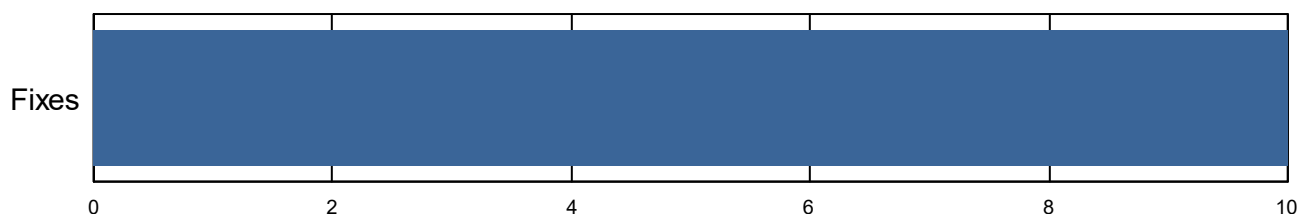
- 40368 The Workflow PowerShell script item was returning a trailing carriage return into a text variable which caused issues when using the variable later on. This has been fixed.

### Web Portal

- 40357 When attempting to add an Action from Explorer and you click the browser back button, selecting the same job again wouldn't show the Job page scroll bar. This has been fixed.
- 40382 The red validation border was either not displaying at all, or was in the wrong position when highlighting mandatory drop-down controls. This has been fixed.

## Release summary

**Total number of changes: 10**





# HelpMaster 21.5.52.38

**Release date** August 12, 2021

**Release type** Maintenance - Upgrade is recommended

**Database upgrade notes** Required if upgrading from any version of HelpMaster

**Database version** 174

## Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v21> for highlights

## Enhancements

### Web Portal

- 40246 Added the ability to select and deselect email recipients from the web portal for Staff user logins only. These can still be locked, even for Staff, from the Action Template's "Options" tab security settings by selecting "Emails".

## Fixes

### Database & Reports Wizard

- 40149 All database upgrade SQL scripts are compatible with SQL Server 2012 and higher instances.

### Desktop

- 38208 An error would occur after attempting to close a job, that the user does not have permission to close jobs via their Job Security Role, when they change the Job Status back to an open status and save the action. This has been fixed.
- 40190 After a job has been sitting open and idle for some time, an error may occur when going back to it and clicking any "Workflow" options. This has been fixed.
- 40221 Creating a new Job Security Role would throw an unexpected error. This behaviour has been corrected.
- 40236 Trying to resolve an address from the Welcome screen Current Location would cause an error to occur. This has been corrected.
- 40237 HelpMaster desktop would crash if the "Admin" "Don't show me again" box was displayed when signing into the desktop edition. This behaviour has been corrected.
- 40257 Clicking "Run Search" from the Saved Searches Administration screen would not allow jobs to be opened from the results list. This has been fixed and jobs can now be opened by double clicking on them from the results screen.
- 40287 When creating a new Saved Search, if you apply more than once during creation a duplicate would be created. This has been fixed.
- 40291 Creating new Entity based Triggered Event Profile was causing an error to occur. This has been fixed.
- 40329 Clicking "Generate SQL" on the Job Finder was causing an unexpected error. This behaviour has been corrected.

### Desktop & Web Portal

- 40216 When using the new Microsoft 365 or Google API email accounts to send email from Actions, the emails were not showing up in the Action afterwards. This occurred whether being added from the HelpMaster Desktop or web portal. This has been fixed.
- 40220 Job Security Roles were not being honoured for "Unassigned Jobs for this skillgroup" in the web portal or the Desktop. This has been fixed.

### Email Manager

- 40131 Email Manager parsers now have improved error trapping and warning reporting when the target for a parser is a control set that does not exist on the target job.
- 40283 There was a default hard-coded value for the date an email is received which should have been showing the actual date it was received on. This has been fixed.

### Web Portal

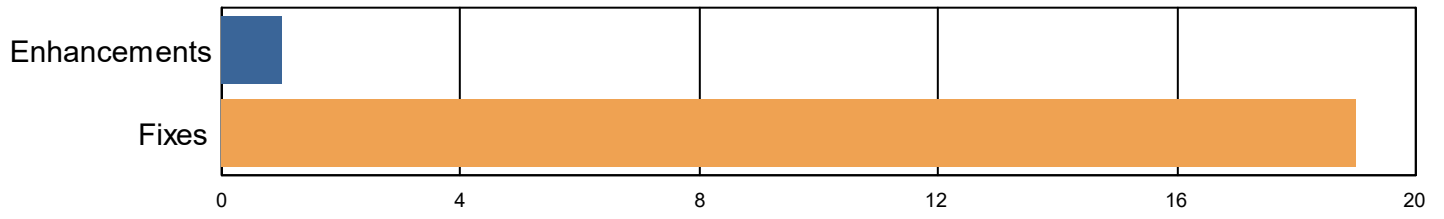
- 40153 The attachment indicator icon was not displaying in the web portal if it was added via an Action and the job entity had none. This has been fixed.
- 40303 If full text searching is not configured in SQL Server a search via the web portal would cause an error. This has been fixed and changing queues will now also clear any search criteria as it does for the Desktop application.
- 40317 Web Portal. Clicking the "Refresh Cache" option under the "Administration" menu link will now update images used in Request Catalogs. These images are cached and will automatically refresh after 10 minutes, or whenever the "Refresh Cache" link is clicked.
- 40325 Typing quickly in text boxes may cause the cursor to jump to the end of the text box and drop characters. This has been fixed.

### Web Setup Utility

- 40187 The HelpMaster Web Setup Utility "Upgrade option was failing. This has been fixed.

## Release summary

Total number of changes: 20



# HelpMaster 21.5.22.8

**Release date** June 02, 2021

**Release type** New major version of HelpMaster + many enhancements and fixes.

**Database upgrade notes** Required if upgrading from any version of HelpMaster

**Database version** 174

## Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v21> for highlights

## Fixes

### Desktop

- 40133 Deleting a job from it's "Properties" tab may cause an error to occur. This has been fixed.
- 40137 If selecting the "Subscribed Templates Only" from an Action or Job Template drop-down list and the Staff user has no template subscriptions, an error would occur and possibly cause the HelpMaster Desktop to crash. This has been fixed.
- 40139 When composing or modifying an email from an Action Template, the new Google API and Microsoft 365 email account types, if selected, would cause an incorrect message stating that HelpMaster can't connect to the mail system. This would only occur if Outlook is not installed on the machine in use. This has been corrected and the message will no longer present.

### Desktop & Web Portal

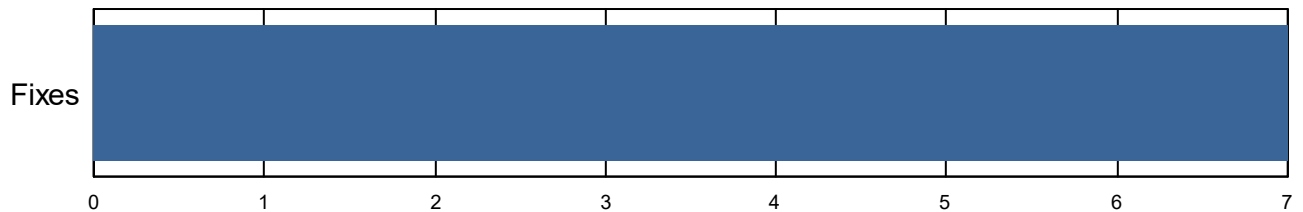
- 40141 Deleted Clients still linked to Jobs were still receiving emails when adding an action and sending emails to 'All Clients' or 'Primary Client + CC All Clients'. This has been fixed and deleted Clients will no longer receive emails.
- 40170 Changes to job/action system codes for the types "job type, job status, priority, contact type, or action summary" were not setting the web cache reset flag so that new and updated codes were incorrectly showing "(Obsolete Code)" in the web portal. This could take up to 15 minutes to refresh. This has been resolved such that most codes will immediately appear (new or updated) upon refresh of the web browser.

### Web Portal

- 40168 Messages for exceeding minimum and maximum control set values were ambiguous. These have been corrected.
- 40178 When logging a new job from the web portal, any selected dates were not setting the time zone correctly. This has been fixed.

## Release summary

**Total number of changes: 7**



# HelpMaster 21.5.7.105

**Release date** May 10, 2021

**Release type** New major version of HelpMaster + many enhancements and fixes.

**Database upgrade notes** Required if upgrading from any version of HelpMaster

**Database version** 174

## Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v21> for highlights

## New features

### All HelpMaster Modules

- 39848 Control Sets can now be configured to contain a "Site Selector" field. This is similar in nature to the existing "Client Selector". Different options can be set to filter the list of available sites for selection. Options include "All sites", "Sites within the hierarchy of the logged-in user", and "Sites linked to the logged in user"
- 39865 System event logging will now track all logins, logoffs, and failed attempts. This information can be used by system administrators, cyber security, and general information.
- 39867 The versioning system for Control Sets has been removed. All updates to the definition of Control Sets will now be immediately implemented for all existing Control Sets across all entities that use that Control Set. Deleted, or removed controls will be archived and displayed in a separate section below the active Control Set.

### Desktop

- 39572 "Administration" (ribbon) > "System Administration" (icon) > "Web Licensing" (option) has been updated to allow bulk enabling and disabling of Staff Web Portal licenses.
- 39854 The Entity Item tab/screen now has splitter bars and better resizing
- 39869 Default Control Sets can now be set per entity type (Clients, Sites, Assets) so that whenever a new entity is created, the default control sets will be created also.
- 40062 API keys were not being stored in the database in encrypted format. All keys will now be encrypted and only the "Copy Key" button will allow the user to access the key.

### Desktop & Web Portal

- 39916 Added the ability to set System Default Templates for the web portal action hyperlinks. They can be found here, "Administration" (ribbon) > "System administration" (icon) > "Default Templates" (panel).

### Web Portal

- 39347 Job Templates can now be configured to allow selection of the job issue/classification via the web portal.
- 39562 Added the ability to inject script & CSS files into the Web Portal HTML head section. This may be useful for adding custom scripts, style sheets, third party plugins, or analytic tracking via scripts. The option can be found under "Web" (ribbon) > "Web Settings" (option) > "Advanced" (tab).
- 39973 New features added as follows...
  1. Ability to hide job Action hyperlinks for Staff users logged into the Web Portal. This checkbox is located on the "Job Template" (per template) > "Options" (tab) > "Available Actions" (section) and is labelled "Hide standard actions",
  2. Ability to add any Action Templates as hyperlinks on the Web Portal per Job Template. This is located on the "Job Template" (per template) > "Options" (tab) > "Available Actions" (section) and is labelled "Extra actions available for use on any Jobs logged by this template",
  3. Ability to define global default Action Templates for each of the standard job Action hyperlinks if not hidden. These setting can be found at "Administration" (ribbon) > "System Administration" (icon) > "Default Templates" (option),
  4. Added Staff visibility options to Job Templates located at "Job Template" (per template) > "Web" (tab) > "Staff options" (section),
  5. On the Web Portal, Action Template fields will be locked according to the existing Action Template settings located at "Action Template" (per template) > "Options" (tab) > "Security" (section) the same as in the Desktop edition.
- 40059 Added an "Allow blank street section" option for when the "Address required" selection is on, the street is then not mandatory from the Web Portal. This option can be found in the Desktop at 'Administration > Client options > Client required fields' under the "Address required" checkbox.
- 40070 Job Control Sets can now be expanded by default if any values exist. The new option to enable this feature is located in the Desktop at Web > Web Settings > Settings > Job Settings and is a radio button labelled "Expanded - when values have been entered".

## Enhancements

### All HelpMaster Modules

- 39561 Added a new "General" > "Alert Type" System Code item for use with Alerts.
- 39600 MailBee IMAP emailing component updated to latest version and fixed an issue where only a single embedded image could be sent. Now multiple images are sending OK.
- 39843 The database connection string for all HelpMaster modules will now include better identification for the Application Name section. This will assist database administrators identify HelpMaster modules in SQL profiling traces.
- 39846 Custom data queries have been improved for better database performance.
- 40096 The HTML control that was being used has been replaced with the new Microsoft WebView2 control. This will give better performance, security and updateability.
- 40097 Outlook emailing components have been updated.

# HelpMaster 21.5.7.105

**Release date** May 10, 2021

**Release type** New major version of HelpMaster + many enhancements and fixes.

**Database upgrade notes** Required if upgrading from any version of HelpMaster

**Database version** 174

## Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v21> for highlights

## Enhancements

### Database

- 39849 Update several database queries to improve performance and stability. Saved searches and other job finder queries will now run much faster and consume less database resources.
- 39856 Control Set database design has been improved.

### Database & Reports Wizard

- 40061 Opening the "Public Template" in the sample database was causing an error to occur. When creating a new sample database the same error was occurring. This has been fixed.

### Desktop

- 39564 Added the ability to lock the ClientID field to prevent Staff from changing it from the default Client ID generation settings. This option is available from "Administration" (ribbon) > "System Administration" (icon) > "Client options" (navbar).
- 39568 It was possible to create duplicate Clients if a duplicate existed and was marked as 'IsDeleted'. This has been resolved and Clients marked as deleted will now be checked as well as active Clients.
- 39576 Added the ability to import entity addresses since updating Country and State lists. Added Country and State free text fields also in case the lists are not fully up-to-date.
- 39586 Control Set password fields store the encryption type.
- 39597 The system administration screen in the Desktop edition has been re-styled for better layout and performance. All configuration changes are also recorded in the new system event log.
- 39598 Job > Workflow > History items will now display an arrow head to indicate the direction in which the workflow items have been changed.
- 39842 Made improvements to the new Entity Items. Deleting with archive or without now works.
- 39844 Truncating system and event logs has been improved. Some logs were not being truncated as per configured settings. This has been corrected.
- 39850 Updating the Job Finder to create much more efficient database queries. This will speed up saved searches, Explorer job counts, job listings and more.
- 39852 Entity Items administration screen sizing and splitter bar improvements.
- 39853 Fixed the deleting of Entity Item data and updated the Purge stored procedures for Jobs and Change Requests.
- 39855 System Event Logs will now track database upgrades and patches. This is useful information for knowing when an upgrade has occurred, and what database upgrades (if any) were performed.
- 39857 Added Application Security Role entry for "Entity Items" under "Screen Access > System Administration screen access" so that Staff access to Entity Items can be controlled.
- 39858 The System Administration screen in the Desktop edition of HelpMaster can now be un-docked from the main HelpMaster window via the "pin" icon in the title bar. Also, scroll-bars will appear on the screen if it is resized to a smaller size, or if it appears on a low-resolution screen.
- 39866 System event logs will be written for any changes to the web request catalog system.
- 39870 The Regular Expression library has been improved for better user interface, usability and internal clean-up of code.
- 39922 It was very difficult to delete a skillgroup because the skillgroup supervisor couldn't be removed at the same time as other Staff members. This has been fixed and the supervisor can now be removed from the skillgroup after all others have been removed and the changes have been applied.
- 39996 Job Timeline chart has been improved by adding Action arrow markers and numbering them.
- 39997 Client Merge will no longer allow the merging of Staff to Staff users as this causes many complications. Clients can still be merged to Staff users as usual.
- 40066 When an auto-save file exists and the user wants to cancel resumption of work from the prompt, the auto-save file was not being deleted and so the same prompt would come up next time HelpMaster was started. This has been fixed.
- 40067 The <Job\_Attachments\_attach> Email Tag was not jumping to the Attachments tab when added to an Email Template to confirm it was added. This has been fixed.
- 40092 The Change Request Email Templates history menu has incorrectly displaying regular email template viewing history. This behaviour has been corrected.
- 40093 Added a new "Security" tab to 'Web > Web Settings' giving the following new options;
  1. Set failed login attempts and lock out time,
  2. Select approved files extensions that can be uploaded via the web portal, and
  3. Limit the size of approved attachments.
- 40094 Notification panel displays a "Loading...." message when loading.
- 40095 Updated the RSS Sidebar Notification panel and Google Maps addin to work with the new WebView2 control.
- 40103 If an Action Template with a "Template Only" Action Summary System Code is added to a job and then the Action Template is changed to one that should not display the same Action Summary in it's selection list, it was still available for selection. This has been fixed and "Template Only" Action Summaries should no longer appear when selecting another Action Template.

# HelpMaster 21.5.7.105

**Release date** May 10, 2021

**Release type** New major version of HelpMaster + many enhancements and fixes.

**Database upgrade notes** Required if upgrading from any version of HelpMaster

**Database version** 174

## Notes

See <https://docs.helpmasterpro.com/docs/release-history/whats-new-for-helpmaster-v21> for highlights

## Enhancements

### Desktop

- 40120 The "Features" tab in the Application Security Roles screen been tidied up to improve control spacing.
- 40121 The Action Template toolbar controls were not sizing correctly. This behaviour has been corrected.
- 40123 Fixed re-sizing issues with the Application Security Roles and Skillgroup screen. Some UI elements were not resizing correctly. This behaviour has been corrected.

### Desktop & Web Portal

- 39566 Added a new Default Control sets feature available from the existing control sets search list. It will allow ordering of default control sets and only allow a single most recent version.
- 39569 Control set date pickers can now be configured for Date + Time, Date only, or Time only.
- 39578 Added Country and State selection drop-downs that load from a database. This replaces the previous manual entry of Country and State for all Entities that have Address fields.
- 39582 Added "Web" tab options to Job Templates to disable and/or force certain job fields from the web portal.
- 39584 Added to the "Web" tab of Job Templates a "Default Job assignment to the logged in user" option assignment override. For Staff logins this option will automatically assign the job to the logged in Staff user instead of the assignment specified in the Job Template. For Clients the Job Template assignment will still apply.
- 39592 Client gender values can now be configured via the System Codes administration screen. Gender can be blanked out.
- 39596 Password complexity rules have been improved to allow system administrators more control over the type of password complexity that is required. Furthermore, password hashing has been improved to use a more secure algorithm.
- 39619 "Show a control set to the user" Workflow item now also shows archived control values. Previously only non-archived controls were displayed.
- 39847 Control Sets and entity items now contain a new site picker control. Updated the wording on the place-holder text to indicate what type of selection is possible.
- 39859 Added the ability to retain Entity Items with values after deleting the item from administration. The item can still be modified or deleted from the entity with the values.
- 39861 Control Set code has been improved for better sharing and re-use for web and desktop.
- 39863 Control Sets and Entity Item code was refactored for better performance and architecture.
- 39864 Workflow Break: The desktop label will now say "Next workflow item to be completed" instead of "Current item" when showing a workflow break that displays the next item.
- 39995 Added an option to always expand Control Sets on the Web Portal. This new option can be found in the HelpMaster Desktop under "Web" (ribbon) > "Web Settings" (option) > "Settings" (tab) > "Job Settings" (section) and is checkbox labelled "Automatically expand Control sets when viewing a Job".
- 39998 All Web Settings changes are now being added to the new system event log.
- 40002
  1. Desktop: Job Templates, Options tab. Added a "Hide standard actions" check box. this will make any Job logged with the template hide the standard action links on the web.
  2. Desktop: Job Templates, Options tab. Added a list of extra available actions. This allows adding new action templates to the action links list on the web (with or without the standard actions). These can be ordered here to decide the order they show in the logged Job.
  3. Desktop: System Administration, Default templates. This was added so the standard action links on the web can have default action templates set behind them (so by default they can send emails, etc).
  4. Desktop: Action Templates, Options tab. Locking options here (to stop reassignment, summary changes, etc) will now also apply to Action Templates used via the Web Portal. Previously they did not.
  5. Web: If a Job has no workflow or the workflow is complete and there are no available actions to add, then we have added a single "Add action link" to ensure that the job can still be actioned.
  6. Web: Closed jobs will always show the re-open link and none of the standard or available actions will be displayed.
  7. Desktop: Job screen, Properties tab, there is a new checkbox "Hide Job standard actions". This will enable/disable the standard job Action hyperlinks on the Web Portal.
  10. Desktop: Action Templates: Dependencies tab will show Job templates that have the action template in the available actions and action templates used in the system admin settings default templates.

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## Enhancements

### Desktop & Web Portal

40112 A new application role setting can be used to allow staff to edit closed jobs and action text. When this setting is on, an additional toolbar button will appear on jobs and actions that will allow editing the job/action details textbox, while the job/action is still closed. This is a handy feature to use when updating/correcting text on jobs and actions without having to re-open them, edit them, and then re-close them (also affecting the action log dates / job close time / date last actioned etc..)

### Installer

39581 Updated Installer with new comments and SHA2 for Timestamp on the digital signature.

### Reports

39579 SAP Crystal Reports Runtime has been updated to Service Pack 30. The version deployed by the executable installers will now be 13.0.30.3805

### Web Portal

38632 Actions that are marked as "Private" by staff member will now display an entry in the Action Log via the web portal so that clients can see that something has been updated, but the details of the action will be marked as "Private Action"

39828 The Web Portal Explorer list of jobs will now display a blue line-marker to indicate where in the list a job \*was\* before it was re-assigned, closed, or otherwise removed from the list. This marker helps the user to keep track of where they were in the list before they actioned the job to remove it from the list.

39937 Added the "To be completed by" field to the web portal and made it editable by Staff logins only. When logging a job it will appear under the Staff user's details but once logged it can be viewed or edited from the "Timeline" tab.

40029 Enhancement: Private Staff actions may now be hidden entirely from Client Web Portal logins. This checkbox option is located at Web > Web Settings > Settings > Job Settings and is labelled "Client Web - hide private actions rather than show a private action place holder".

Also a "Last Actioned:" label has been added underneath the "Update Job" button so that Clients can still get an idea of when the job was previously actioned if the last action was a private one.

40069 Control Sets on the Web Portal will now show a star (\*) on the tab label when it contains any data. This applies to Jobs (both Staff & Client logins), Client, and Site screens.

### Web Setup Utility

39565 The HelpMaster Web Setup utility has been updated to work with the new Blazor web portal.

39587 Control Sets can now be configured to be automatically added to new entities (Clients, Sites, Assets).

40122 The web portal deployment utility has been improved for better error checking, application pool management and better user interface.

40129 Update web installer to improve user interface, SSL certificate selection, WebAPI deployment and improve error trapping and reporting.

## Fixes

### Active Directory Module

39510 A long LDAP query filter would cause a SQL truncation error. This has been corrected.

39583 Widen the LDAPQueryFilter column in the database to fix potential truncation issues.

### All HelpMaster Modules

39601 Office 365 legacy IMAP mailbox would fail to send email if the "From:" address was blank. This has been fixed.

### Database & Reports Wizard

39961 Full Text catalogs were not being restored when the "/patchonly=1" command line option was being used. This has been fixed and full text catalogs will now be restored after patching using the command line options.

### Desktop

39408 Clicking on a \*.msg type attachment was throwing an error. This has been fixed.

39574 Client control set fields were not storing their value correctly after an upgrade. This has been corrected.

39575 Address based Email Tags had a problem. This has been resolved.

39580 Deleting a Triggered Event Profile that searches on a Control Set would cause a 'Reference Constraint error. This has been fixed.

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## Fixes

### Desktop

- 39588 Job terminology change was not updating "All Unassigned Jobs" on the Jobs ribbon under "My Jobs". This has been fixed.
- 39590 Merging clients that had workflow history would cause an unexpected error. This behaviour has been corrected.
- 39593 Fix SQL syntax error when searching on control-set date fields that have passed their date value.
- 39594 Fixed several issues with merging clients.
- 39599 Fixed issue with different control set versions for the Show Control Set workflow item.
- 39633 Clicking the "Preview" tab on a new Control Set that has no detail added was causing an error to occur. This has been resolved.
- 39651 Previously it was possible to delete a Staff user even though they were a skillgroup supervisor which could cause issues with emails still being sent to them after deletion (as they are only marked as deleted in the database). This has been fixed and a message will pop-up stating that the user must be replaced by another as the skillgroup supervisor before deletion is possible.
- 39661 Workflow Script and Milestone item titles were not displaying correctly if the titles were more than a single line. This has been fixed.
- 39766 Updated wording on the Action screen dialog box when selecting a new Action Template when text has already been entered.
- 39775 Removing a skillgroup was being prevented unless a dummy Staff member was linked, the other Staff member removed, and then the dummy Staff was deleted. This has been resolved and the final Staff member of the skillgroup can now be removed before deleting the skillgroup.
- 39778 In some multi-screen layouts, the emailing error information screen would not be visible i.e. off screen. This problem has been fixed.
- 39819 An error may occur when updating the Working Folder Locations from System Administration. This has been fixed.
- 39860 Updating the TimeZone on your personal record from the Desktop edition may cause HelpMaster to hang and error. This behaviour has been corrected.
- 39862 Fixed a bug when copying/pasting, or duplicating an Action Template in the workflow designer.
- 39888 Deleting a skillgroup was not possible because the validation was preventing it due to the requirement to have a skillgroup supervisor. This has been fixed.
- 40025 Adding Services to a Site entity would cause an error to occur when applied. This has been fixed.
- 40091 The Change Request Email Templates history menu has incorrectly displaying regular email template viewing history. This behaviour has been corrected.
- 40104 Fixed error with KB screen and new HTML control.
- 40107 Invalid job number in the Goto box was causing an unexpected error
- 40113 Fixed minor issues with themes. Some background colours on the client/site screen were not being replaced correctly.
- 40114 Fixed an issue on the client screen when deleting the site from the front tab. It was not saving correctly. This behaviour has been corrected.

### Desktop & Web Portal

- 39527 Added the "Add cancelled action path" check box to Workflow Action items. This will allow the cancellation of the Action and return it to the previous Workflow step.
- 39591 Control set validators for clients, sites and assets were not working as expected. This behaviour has been corrected.
- 39624 Control Set client picker were not displaying correctly from workflow. This has been fixed.
- 39880 Control Set drop-down boxes were incorrectly displaying "Obsolete code" in some instances. This has been corrected.
- 39981 Job Control Sets were not updating correctly when changed while adding an Action to the Job. Also the Control Sets tab view would not refresh after the same procedure. These issues have been fixed.
- 39982 Job Template Control Sets with values pre-selected, were not being added to the jobs logged whether logged from the Desktop or the Web Portal. This has been fixed.
- 40000 An error would occur if viewing a password Entity Item before it was applied to the entity e.g. Client. Also adding more than one of the same Entity Items to the same entity e.g. Client, would cause another error and password views were not being saved correctly for both Entity Items. These issues have all been fixed.

### Email Manager

- 39758 When using an Email Manager parser on an email with a blank subject, an unexpected error would result. This behaviour has been corrected.
- 39765 Email Manager was not setting the attachments flag correctly resulting in the attachment icons not displaying for new Jobs and Actions even though attachments existed for both. This has been fixed.
- 39884 Application error jobs were either logging and still being moved to the failed folder, or they were being logged as orphan jobs without a Create & Assign action. This has been resolved.

### Triggered Event Module

- 39595 Triggered Events. When logging a job based on a site, linking the site to the newly logged job was not setting it as the primary site. This behaviour has been corrected.



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## Fixes

### Web Portal

- 39504 Workflow "Milestone" and "Break" items were preventing workflow continuation from the web portal. This has been fixed.
- 39508 The "Client Responded" job state was incorrectly showing on the web Explorer screen after sending an update to a client. This has been fixed.
- 39517 Web Portal was not displaying Knowledge Base article inserted images stored in the working folder locations 'HTML Images' path while embedded images were OK. This has now been resolved and all images are displaying correctly.
- 39523 The "OK" button was not active when adding an action from the web portal unless something in the action was changed. This has been fixed so that workflow items can be completed without input.
- 39525 Attachment uploading, display and handling have been improved in the web portal.
- 39529 Reassignment action would only accept Staff in their default skillgroup. This has been fixed and any combination can now be selected based on Staff membership and permissions.
- 39542 Attachment image scroll arrows have been improved and given a black border so that they are visible with both light and dark backgrounds.
- 39604 Date/Time Control Set items were defaulting to 12AM after selecting a date. This will now default to the current time. Also added separate Date and Time Control Sets so that either one or both can be set as a mandatory option.
- 39743 Message Board images posted to the Web Portal (News items) were not displaying any inserted image. This has been fixed.
- 39744 News items wouldn't open from the "Latest news" page. This has been fixed.
- 39930 Job template attachments were not being added to jobs logged by it from the web portal. This has been fixed.
- 39970 Web portal. The attachment icon in the Action Log was not being removed when the attachment was removed. This has been corrected.
- 39987 Control Set TriChoice control was not showing the Negative or Else result when viewed from the web portal. This has been fixed.
- 40012 Typing quickly in an action Details field on the Web Portal was causing the text caret to jump to the end if typing amongst existing text. This has been fixed.
- 40078 Attempting to login to the web portal using an invalid user name and password send the user to a page that says "There is nothing at this address" instead of displaying "Invalid login attempt". This has been fixed.
- 40126 The "See all..." my jobs on the home page was going to an invalid link. This has been fixed.

### Web Setup Utility

- 40077 New Web Portal port / host name conflict checks were not being performed and the "Upgrade" feature was failing also. These issues have been resolved.

## Release summary

**Total number of changes: 136**

