

COVR B.V.B.A.

Release Notes

cmOffice – Release 2.81 build f

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Introduction

This Release Note provides the latest information about new features, enhancements and defects fixed in any of the builds of cmOffice version 2.81.

All described changes apply for version 15 of cmOffice. Those changes that also apply to the latest version 2.75 build b for version V13 of cmOffice, do have an indication “also V13” in the title bar.

cmOffice – RELATION MANAGER

WHAT HAS CHANGED IN THE RELATION MANAGER?

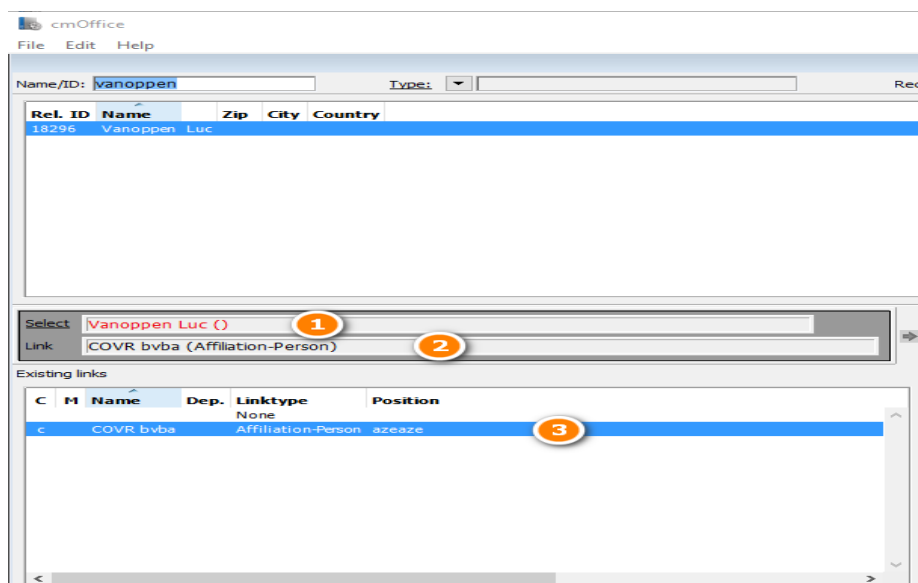
The biggest change is in the internal, technical setup of the relation structure in the Relation Manager (Module) inside cmOffice.

Because of this major update in also the cmHost application needed to be reworked. Covr decided to create a new cmHost application named cmRelationManager. The cmRelationManager is explained in the document “cmRelationManager.pdf” located in the <http://www.covr.be/downloads/reference> page.


OLD RELATIONS MODULE (VERSION 13)

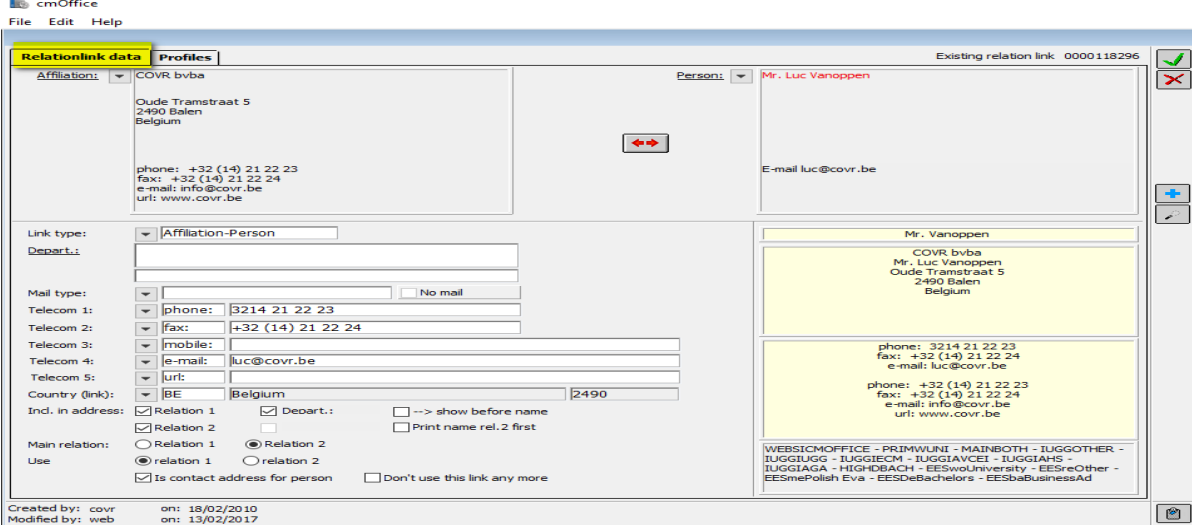
In the old relations module, the relation content was build-up with 3 components:

1. a relation record of type “Person”
2. a relation record of type “Affiliation” (optional. Alternative is the “None” record)
3. and one or more relation **link** record(s) connecting an “Affiliation record” record with a “Person” record. (several affiliation records can be linked to one person record)



A double click on such a relation record (link) revealed the detailed info contained in that record. As an

example, a double click on the relation link record  displays the next info:



cmOffice
File Edit Help

Relationlink data Profiles Existing relation link: 0000118296

Affiliation: COVR bvba
Oude Tramstraat 5
2490 Balen
Belgium
phone: +32 (14) 21 22 23
fax: +32 (14) 21 22 24
e-mail: info@covr.be
url: www.covr.be

Person: Mr. Luc Vanoppen
E-mail luc@covr.be

Link type: Affiliation-Person
Depart.:
Mail type: No mail
Telecom 1: phone: 3214 21 22 23
Telecom 2: fax: +32 (14) 21 22 24
Telecom 3: mobile:
Telecom 4: e-mail: luc@covr.be
Telecom 5: url:
Country (link): BE Belgium 2490

Incl. in address: Relation 1 Depart.: --> show before name
 Relation 2 Print name rel. 2 first

Main relation: Relation 1 Relation 2
Use: relation 1 relation 2
 Is contact address for person Don't use this link any more

Mr. Vanoppen
COVR bvba
Mr. Luc Vanoppen
Oude Tramstraat 5
2490 Balen
Belgium
phone: 3214 21 22 23
fax: +32 (14) 21 22 24
e-mail: luc@covr.be
phone: +32 (14) 21 22 23
fax: +32 (14) 21 22 24
e-mail: info@covr.be
url: www.covr.be

WEBSICMOFFICE - PRIMWUNI - MAINBOTH - IUGGOTHER -
IUGGIUGG - IUGGIECM - IUGGAVCET - IUGGIAHS -
IUGGIAGA - HIGHOBACH - EESvolUniversity - EESreOther -
EESmePolish Eva - EESDeBachelors - EESbaBusinessAd

Created by: covr on: 18/02/2010
Modified by: web on: 13/02/2017

NEW RELATIONS MODULE (VERSION 15)

In the new relations module, the relation content is contained in 1 relation record. This record contains **all** the associated data of a person (also called an account in the remainder of this document) or an institute.

Links are no longer used. Each relation record is self-contained. All data is bundled in that 1 record.

The main advantages are a less complex handling of the data in the cmOffice internal code and a more comprehensive overview. A disadvantage might be that the user of the system has to input more data. In part II a process is described to minimize this extra work.

More info on the Relation module & Manager can be found “CMOffice_Relation_Manager.pdf” located in the <http://www.covr.be/downloads/reference> page.

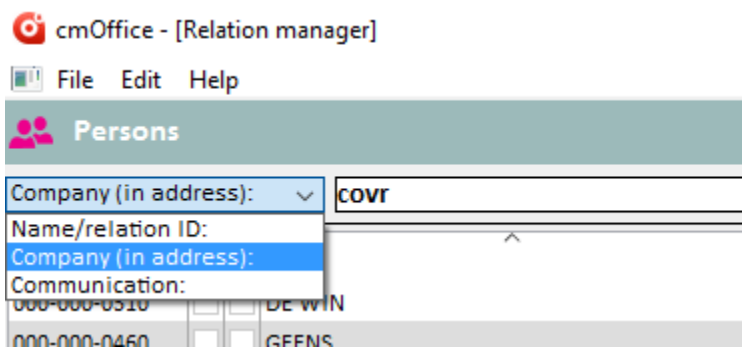
NEW: SEARCH: EXTRA FUNCTIONS

The search in “Persons” relations has been extended with the possibility to search for a company name associated to a person relation record. (see example)

And vice versa: The search in “Institutes/Companies” relations has been extended with the possibility to search for a name.

Search relations

note: this function can also be selected via




In this version, one can also search for an e-mail address, a phone number, one can search on any of the communication possibilities within cmOffice.

BUGFIX: FEE RECORD

Under certain conditions, it was not possible to add a registration fee (the new record could not be saved). This has been resolved.

cmOffice - General


CMOFFICE – MAIL (MERGE) SETTING

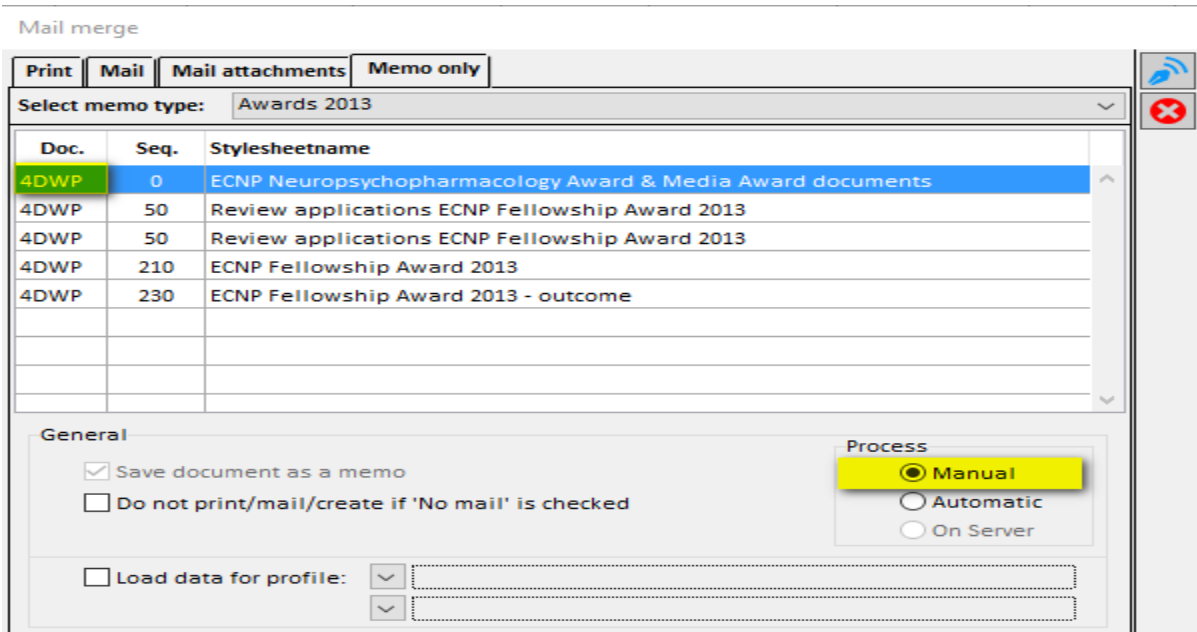
Whenever a user initiated a mailing function () , the settings (memo type, document to send, and all the fields in the general settings) needed to be re-defined.

From this version onwards the settings are stored and brought back the next time a mailing function is initiated.

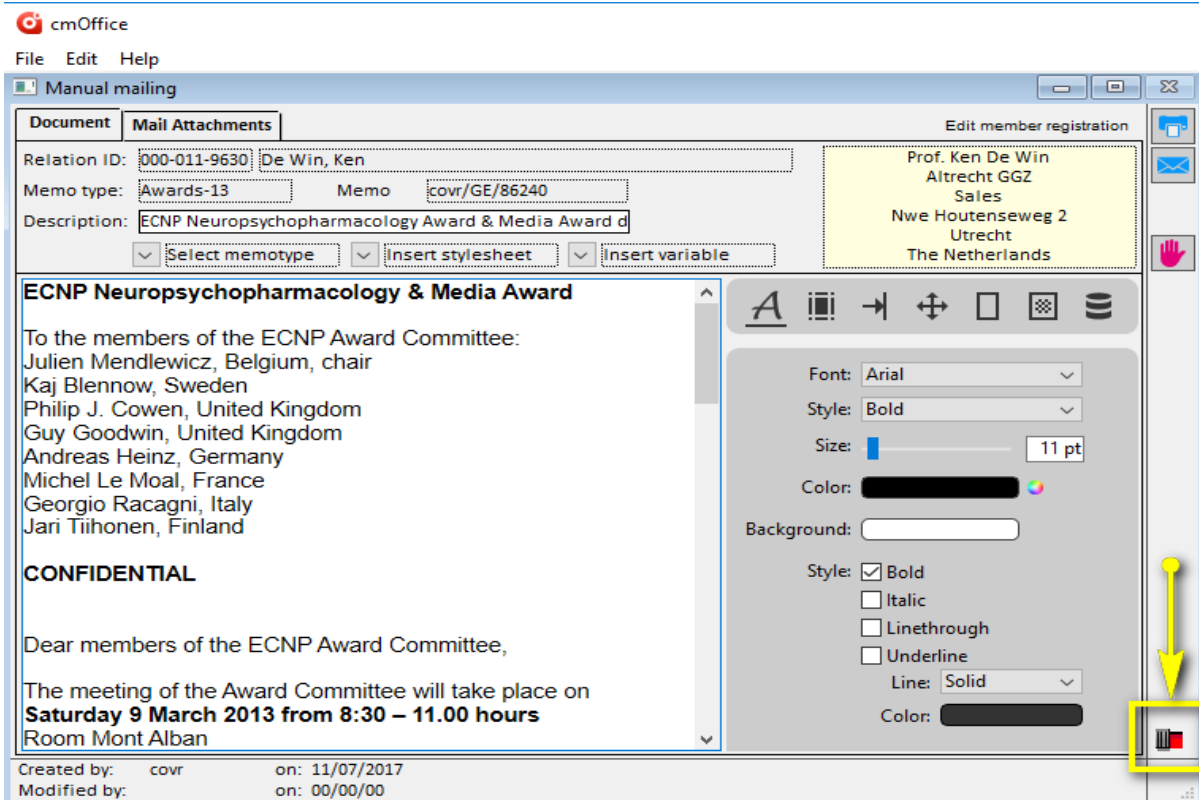
CMOFFICE – MAIL (MERGE) PREVIEW 4DWRITE DOCUMENT

A user sending out a 4D-write document is able to preview the first document before sending out the remaining documents.

How is this done? Select the mail(-merge) function. Fill out the memo type, select the 4Dwrite document and put the process mode an “manual” and click on . Click on “OK” in the Printer Setup window and on “OK” in the Print window.



The 4Dwrite document will open in manual mode. You can step through the selected records by choosing either print or mail. if you move the sidebar(see yellow arrow and box) to the right, the mail(merge) will switch to automatic mode. All other selected records will then be processed (either printed or mailed depending on the action the user did choose).



NEW: HOTEL DEFINITION: DEFAULT CHECKBOX

A user is now able to use the checkbox “Default selected”. In previous versions this checkbox did not contain any functionality. 1) Bij de hoteldefinities kan je nu wel die default checkbox afklikken.

A user can now select which items should be selected by default for a fee. For instance: lunch included, minibar, a safe, ...

The screenshot shows the 'Hotel definition' window in cmOffice. The 'Hotel agreements' tab is active, displaying details for 'Hotel Tivoli Oriente' and 'Lisbon 2015'. A table of fees is shown with columns: Description, Fee, Extra code, VAT type, Acc., Pers., Night, Inv., and Def. The 'Standard' fee (100,00) is selected, and its 'Def.' checkbox is checked and highlighted with a red box. Below the table, a summary row shows 'Standard' with a fee of 100,00, extra code 'HOT1', a 21% VAT rate, and the 'Default selected' checkbox checked. A note indicates that if the 'Invoice' checkbox is not checked, the fee is direct payable to the hotel.

Description	Fee	Extra code	VAT type	Acc.	Pers.	Night	Inv.	Def.
Standard	100,00	HOT1	TREGIS			*	*	*
Luxury	200,00	HOT2	TEXHIB			*	*	*
Standard	100,00	HOT1	Default	21%				<input checked="" type="checkbox"/> Default selected
	121,00							<input checked="" type="checkbox"/> Invoice (if not checked fee is direct payable to the hotel)

BUGFIX: HOTEL BOOKING

The “date pickers” for the selection of the check-in and check-out dates are now active in the registration module.

BUGFIX: DROPDOWN LISTS

It is no longer needed to perform a “reset local datafile” if one adds a congress related item like a fee or an extra. It is sufficient to close the Admin module to have the new item displayed in the dropdown list.

cmOffice – Admin settings

NEW: SMPT PORT MAIL SERVER – ALSO V13

It's possible now to define the port to use for the smtp-communication with the mail server. Until now cmOffice always used port 25. This is still the default port.

To use another port create the default value "mailServersmtpPort" and enter the port in the the_value field.

NEW: SECURE SMPT COMMUNICATION – ALSO V13

The smtp-communication with the mail server can occur now over a secured connection. To activate this create the default value "mailServersmtpsecure" and enter "True" or "Yes" in the the_value field.

cmOffice - FINANCIAL

NEW: INVOICES: INVOICE MEMO

The screenshot shows the cmOffice application window for 'Invoices'. The main form contains the following fields:

- Company: ESHRE
- Conference: Lisbon 2015
- Type: Invoice
- No.: 201500528
- Conf. No: 2015PT0012
- OGM: +++515/0000/22883+++
- Invoice date: 10/02/15
- Payment: Online credit card
- Currency: EUR
- Status: 0-Balance
- Date: 12/01/15
- Payment result: 1310163093
- ACCEPT

Below the form is a table with the following columns: Description, QTY, Unit price, Debit excl., VAT%, VAT, Debit incl., Credit cur., Credit, PM Cur., PM Debit excl., PM V.

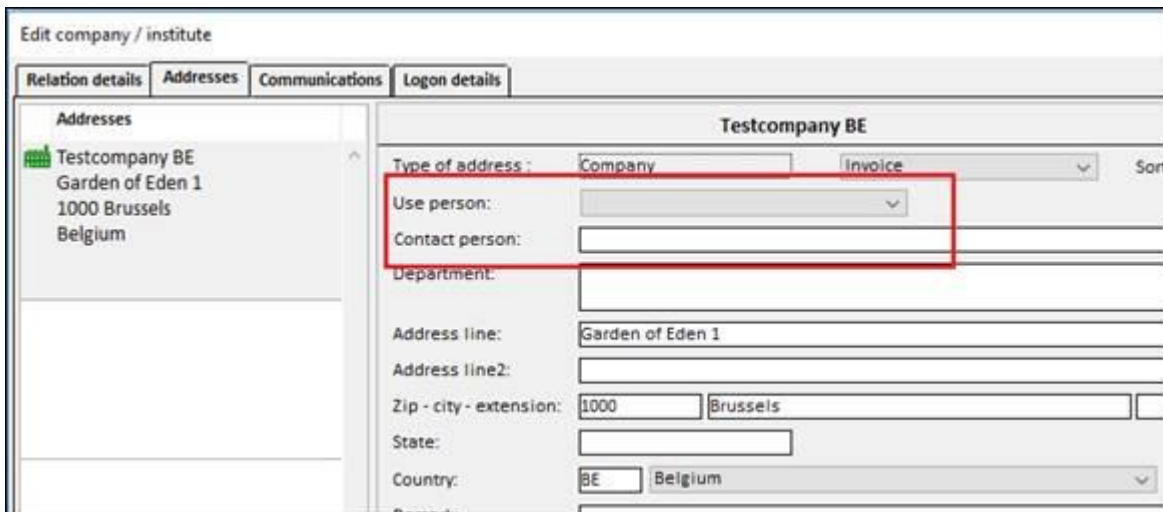
Description	QTY	Unit price	Debit excl.	VAT%	VAT	Debit incl.	Credit cur.	Credit	PM Cur.	PM Debit excl.	PM V
Main programme (E) / Member	1,0	300,00	300,00	23,0	69,00	369,00		0,00	EUR	300,00	€
PCC 6 - Reproductive Endocrinology / Member	1,0	100,00	100,00	23,0	23,00	123,00		0,00	EUR	100,00	2

Tot nu lukte dit niet omdat het documenttype van de invoice stylesheet steeds automatisch werd omgezet in "4DWP" (de nieuwe 4D Write). Het documenttype van de facturen moet steeds "doc" (Word) zijn ovw de online facturen. Omdat het type werd gewijzigd, werd cmDocument niet geactiveerd.

NEW: INVOICES: INVOICE CONTACT PERSON

How to add a contact person in the address card within the invoice input window?

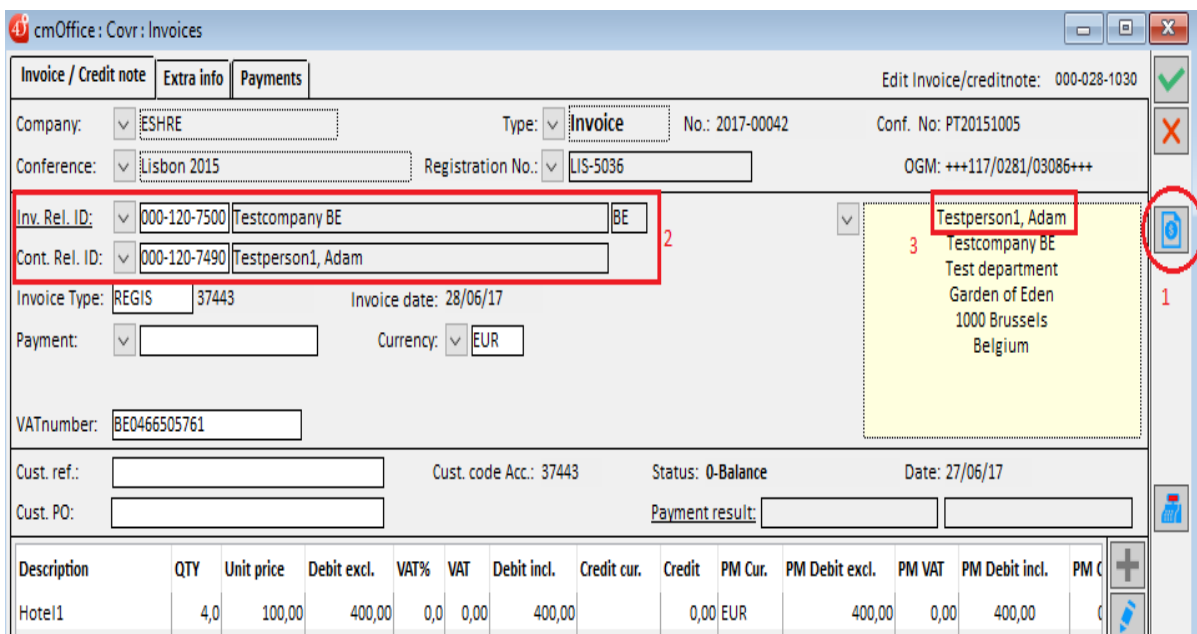
- a) Suppose you do have a company bv. Testcompany BE with an address card in which no contact person is filled out.



If you select this company in an invoice (invoice picture), the invoice address then becomes:



If you now select a contact person (Invoice picture, item 2), then his/her name will be added in the address card (Invoice picture, item 3). The name will be added on top of the address card.



How to change a contact person in the address card within the invoice input window?

- b) Suppose you do have a company bv. Testcompany US with several address cards. Each of these address cards has a contact person filled out.

ps: the contact person in an address card does not need to be known as a relation saved in cmOffice. You can fill in any name.

If you select such a company in an invoice, by default the contact person of the main address card will be filled out in the invoice address card.

The dropdown list in front of the address card, will contain all contact persons of that company. You can then select another person to have the contact name changed in the invoice address card.



BUGFIX: VAT

In some (exceptional) cases the VAT percentage of the country of the participant was taken instead of the VAT percentage of the country of the invoice address. This is resolved in this version.

cmOffice – SCIENTIFIC PROGRAMME

BUGFIX: SESSION TIME SLOTS: DEFAULT CONGRESS

Timeslots could only be added if a default congress was set in the cmOffice preferences. This has been fixed. Timeslots can now be added without having set a default congress.

Tip: How to set a default congress?

Select File / Preferences in the upper left corner.

Select a congress out of the “Default conference” list

Save the setting via the green V-button.

BUGFIX: DUPLICATED KEYS

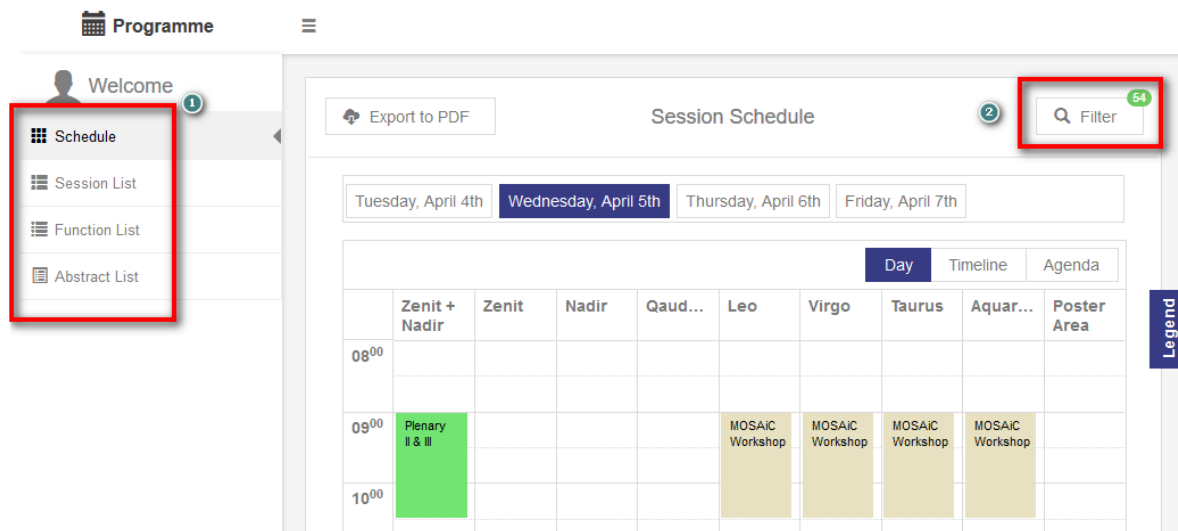
When creating Topics it could happen that duplicated keys disturb the creation process. This is now resolved.

NEW: CMSEARCHABLEPROGRAMME

The idea was to create a new searchable programme that has a grid option based on Telerik Scheduler. Basically, this is a back to the old web UI grid page but then in a modern, more flexible AND - very important for our customers – a configurable version. All data and text appearing in the searchable programme pages are highly configurable. Access to the searchable programme is open for everyone or linked to a login.

Several views are preprogrammed (see (1)) and an extended filter functionality allows the user to browse into the searchable programme.

Explore the benefits of this new searchable program.



Do you want to know more? Contact Covr.

UPDATE: CMMEMBERSHIP – MULTIMEMBER REGISTRATIONS

The membership application (cmMembership) gives the user the possibility to register multiple members within one session. By default the membership application registers one person in one session (individual registration). The new settings allow a user to tune the membership application such that more persons (individuals) can be registered in one go.

New members can be added as long as the multimember registration is open i.e. the payment is not yet done.

In the booklet “How to setup a multimember registrations” we explain the needed configuration settings in the cmHost application cmMembership to tune an individual membership into a multimembership registration.

On demand, Covr will send you this booklet.