COVR B.V.B.A.

Release Notes

cmOffice – Release 2.84a

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Content

Introduction

These Release Notes provide the latest information about new features, enhancements and defects fixed in any of the builds of cmOffice version 2.84.

All described changes apply for version 15 of cmOffice.

cmOffice – General

MEMO DESCRIPTION

The size of the Memo's description is extended from 60 to 200 characters. This description is used as the mail's subject if the memo is mailed.

INVOICE NUMBERING

There are two main types of Invoice numbers:

The first type of invoice number restarts every new fiscal year from 1.
In the definition of these invoice numbers in the Administrator's table "* General/Counters" the year is filled in in the "forYear" field. If a new fiscal year starts, this counter record is duplicated with the "forYear" field set to the new year and the "Sequence_number" field reset to 0.

The second type of invoice number keeps incrementing over the years.
Until this version of cmOffice the first five characters of the corresponding conference was filled in in the "forYear" field in the definition of these invoice numbers in the Administrator's table "* General/Counters". Because of this the first five characters of the conference code needed to be unique if you wished to use this type of invoice number.
From this version the full conference code can be filled in in the "forYear" field.

EXHIBITION MODULE

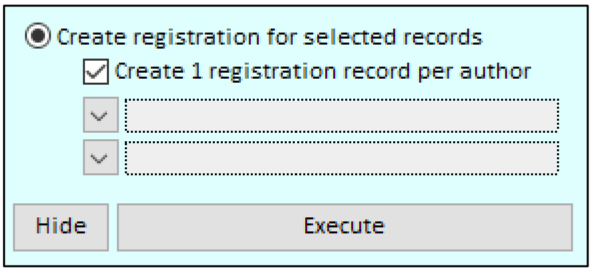
The columns "Total Excl." and "Total VAT" are added in the main window of the Exhibition module.

STYLE SHEETS MODULE

The column "Company" is added in the main window of the Style sheets module. The company field is added in the general search dialog.

MODULE: RELATIONS, RELATION DETAILS AND ABSTRACT-FUNCTIONS

It could be that the company wasn't filled in in the registrations if these registrations were created for a selection of relations or abstract functions with the extra function



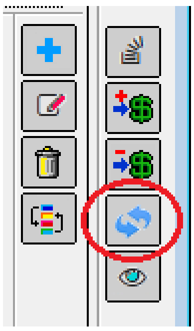
cmOffice – Financial

FINANCIAL RESET

<u>Financial Reset of a Registration, Member registration or Sales & floorplan registrations (Exhibition)</u>

Registrations, member registrations or Sales & Floorplan registrations (tab *Sponsorship*) can only be financially reset by cmOffice users with an authorization level of at least 3 for the module in which the financial reset will be executed if no single final invoice or credit note is linked to the registration record.

If the registrations, member registrations or Sales & Floorplan registrations (tab *Sponsorship*) already have at least one final invoice or credit note it can only be financially reset by cmOffice users with an authorization level of 9. A final invoice is an invoice that already has an invoice number.
They also need to enter the financial reset password. This password needs to be defined in the Administrator's table "* default values". Description = "FinancialResetPassword". The password needs to be filled in in the value field.



To financially reset a registration, member registration or exhibition, you have to select the "Financial Reset"-button in the input window.

After a financial reset of a registration, member registration or exhibition the following will be done:

1. All invoices and credit notes without a number will be deleted.
2. All invoices and credit notes with a number will have the financial status 0-Balanced. Their invoice subtype will be "Reset".
3. An extra invoice or credit note will be created if necessary. It will have the financial status 0-Balanced and invoice subtype "Reset".
4. All existing payments will be deallocated from the invoices and become 'Open' payments linked to the registration. This means that as soon as a new invoice will be created for the registration, member registration or exhibition, this 'open' payment will automatically be allocated to this new invoice.
   These payments remain saved to the original Payment reference.
   Open payments are shown as gray invoice allocation lines in the Payment detail window in the Payment module.

5. Because the previous invoices and credit notes and the optional ‘reset’ invoice or credit note need to have the financial status 0-Balanced a ‘Reset’ Payment will be created if necessary. cmOffice will create maximum one ‘Reset’ payment per month. This payment will have the virtual account “RESET” and will only contain payment detail records with a credit amount of zero.

6. The total amount invoiced of the registration, member registration or exhibition will be zero.

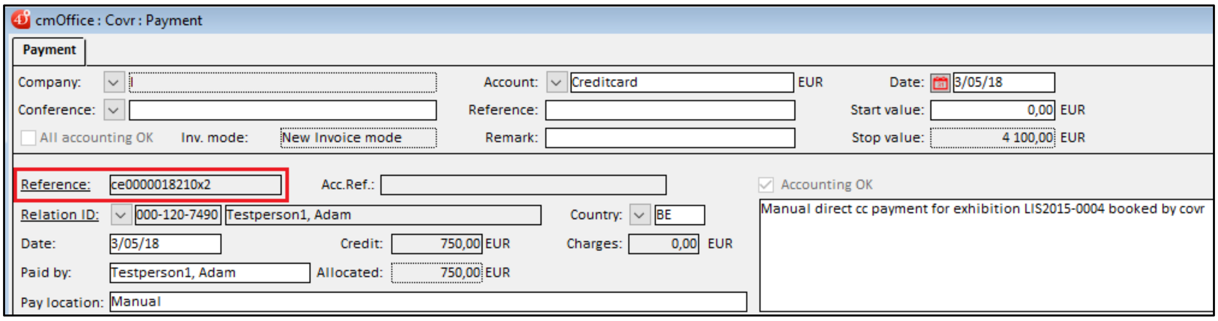
7. All participant, member subscription or exhibition detail records in the sub table will be colored black indicating that they aren’t invoiced yet. The percentage already invoiced of the exhibition detail records will be reset to 0%.

The data of the invoices and credit notes that are reset won’t have any influence anymore on the new invoices created for the relevant registration, member registration or exhibition.

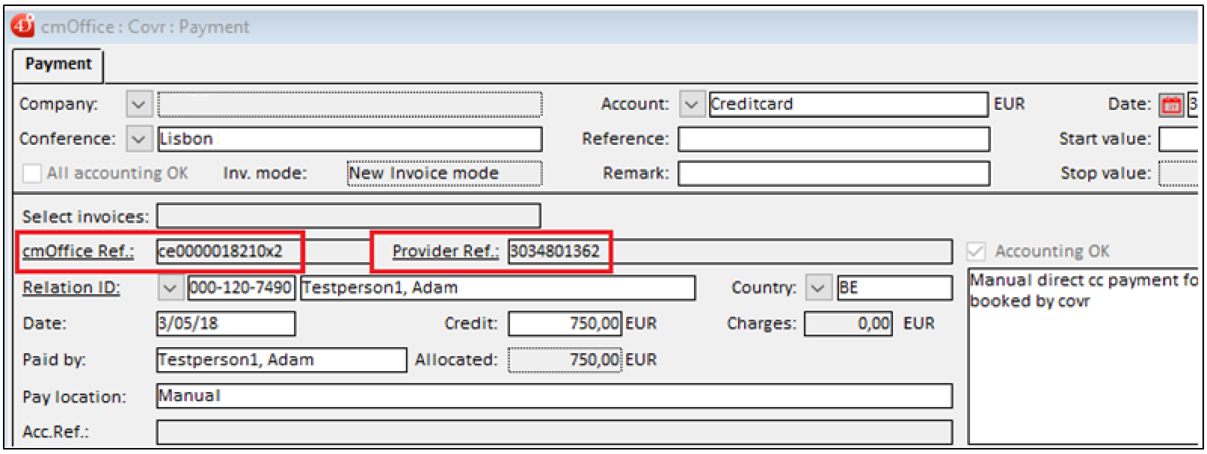
PAYMENT REFERENCES

Customer payment reference and Provider payment reference

Until now only one reference field was available in the Payment detail record.



Starting from cmOffice version 2.84 we split this Reference field in two fields Customer payment reference and provider payment reference.



The Customer payment reference is a unique code created by cmOffice.

The Provider payment reference is a code returned by the payment provider after handling the payment.

CREDIT CARD PAYMENTS

The Customer payment reference is used as reference in a request for an online or direct credit card payment by a payment provider. Its format is xxYYYYYYYYYY where YYYYYYYYYY is an ID of cmOffice and xx is:

xx	YYYYYYYYYY	Description
cr	Invoice ID	It's an online or direct cc payment for a Registration
cm	Invoice ID	It's an online or direct cc payment for a Member registration
ci	Invoice ID	It's a direct cc payment from within the Invoice module
ce	Exhibition ID	It's a direct cc payment from within the Exhibition module
bp	Invoice ID	The payment is imported on the 4D Server from an export file of the accountancy that didn't contained a payment reference.

If an invoice is paid by multiple partial cc payments, cmOffice adds "x3" followed by a sequence number (01-99) to the Customer payment reference so the reference used for the payment request is always a unique code.

CASH PAYMENTS

If a cash payment is entered from within the drawer window, the cmOffice user is saved as Provider payment reference.

The Customer payment reference can be in order of priority:

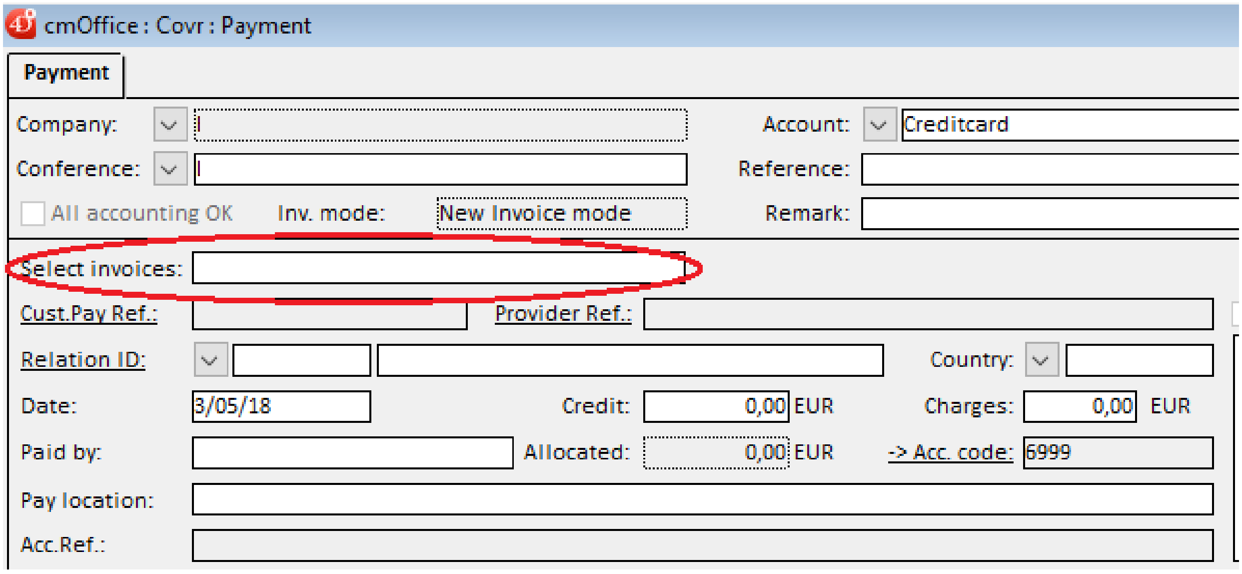
- The Customer payment reference of the invoice that has been paid
- The invoice number
- The main record reference of the invoice (registration number, member registration number, exhibition number)
- The relation ID of the invoice

MANUAL PAYMENTS

In the Payment module you can enter a payment manually. In the payment window you can search for the invoices to which the payment can be allocated to, by entering a search value in the "Select invoices" field or by selecting a relation.

The search value can be:

- A provider payment reference
- A customer payment reference
- A customer reference
- An invoice number
- A conference invoice number
- The main record reference of the invoice (registration number, member registration number, exhibition number)



The value searched on will be saved as cmOffice reference if this reference still was empty.

The Provider payment reference is left empty when you manually enter a payment.

INVOICE STEP IN (MEMBER) REGISTRATION PAGES

The main function of the invoice step in the online (member) registration is

- to input an *address* to whom the invoice needs to be sent (Person or institute that pays the registration) and
- to optionally provide a unique reference number which can be used to prove to a tax authority that a particular VAT number was confirmed at time of purchase, taking into account rules set out by the **VAT Information Exchange System (VIES)**.

With the aid of scenarios, the adapted invoice step functionality is described in the document named "M170012 Invoice Step" (available in http://www.covr.be/downloads/reference).

First, an explanation is given related to address terminology used in the relation manager. Secondly, the activation of the VAT settings is described. Enjoy the reading.

FIX: EXPORT INVOICES

Not all invoices could be exported for the accountancy if the selection of invoices contained multiple invoices of the same relation.

cmOffice – Payment

NEW: IMPORT PAYMENTS WITHOUT RESTRICTIONS

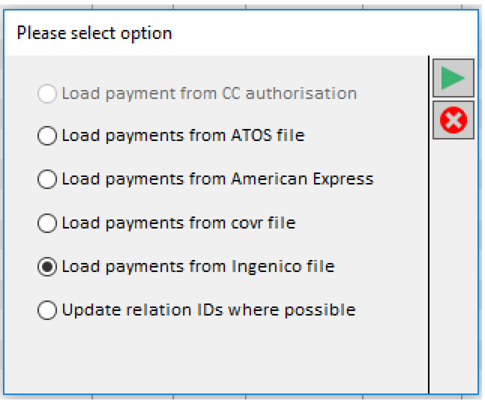
Until now the maximum amount that could be allocated to an invoice during the import of a payment was the amount to pay of that invoice. Another limitation was that refunds (negative amounts) only could be allocated to credit notes (also negative amounts).

To bypass these two restrictions, we added the "Reconcile 1 full amount"-button . This button can be used to allocate a payment or refund to an invoice or credit note without limitations. This function is only available for users with a Payments authorization level of 6.

If you allocate a payment of the import file to an invoice by manually selecting that invoice , this allocation occurs from now on always without restrictions.

NEW: IMPORT PAYMENTS INGENICO

The import of payments also supports the reports of the Ingenico payment provider.



FIX: IMPORT PAYMENT

During the import of a payment the allocation to an invoice failed if it was a partial payment of this invoice. The invoice was not selected.

FIX: NAVIGATION

The navigation between the modules when manually selecting invoices during the import of payments is improved.

cmOffice – Scientific program

FIX: SESSION IDENTIFICATION MANDATORY

Whenever a session record is created a session identification needs to be filled out. This is a change to fix a problem which emerges when sessions are saved without a session ID. The session ID is the key identifier about a session and cmOffice needs that for all other modules (and linked web pages) which need data from sessions. In the past it was possible to create errors by saving a session without an ID. So session ID has now been set as required

So yes, you need to enter a ID for all sessions. But this can be a temporary ID and as simple as A, B,C or 1, 2,3. Also for checking time conflicts etcetera, you can use a temporary session numbering (1,2,3, …) and only do your re-numbering when the programme is final.

By default, all sessionID 's are filled out with the sequence number of the session.

SELECT ALL: CTRL+A

the control key function CTRL+A (select All) is now also implemented within the session module in cmOffice

cmOffice – Abstract-Functions

FILE MANAGER UPGRADED FOR ABSTRACT FUNCTIONS

The upgraded file manager in abstract functions (the famous "cloud" button) allows you to update any picture or table added in the abstract body.

The steps to take:

- upload the picture
  - select and open an abstract via the module Abstract Functions"
  - Click on the cloud and use the function "Upload file"
  - Browse to the picture you do want to upload, select it and click on "Open"
  - As a result, the uploaded file is added in the documents overview
  - now select the file in the documents overview and use the function "Insert picture in abstract text"
  - As a result the picture is added at the bottom of the abstract text
- Edit the abstract
  - Select the "Abstract" tab in Abstract – functions
  - Select the Edit tab and position your picture on the correct location (cut – paste)
  - **important**! Save your update by clicking on "Update abstract text" in the bottom right corner.
  - Save the abstract record
- Check the result
  - Open the saved abstract record and

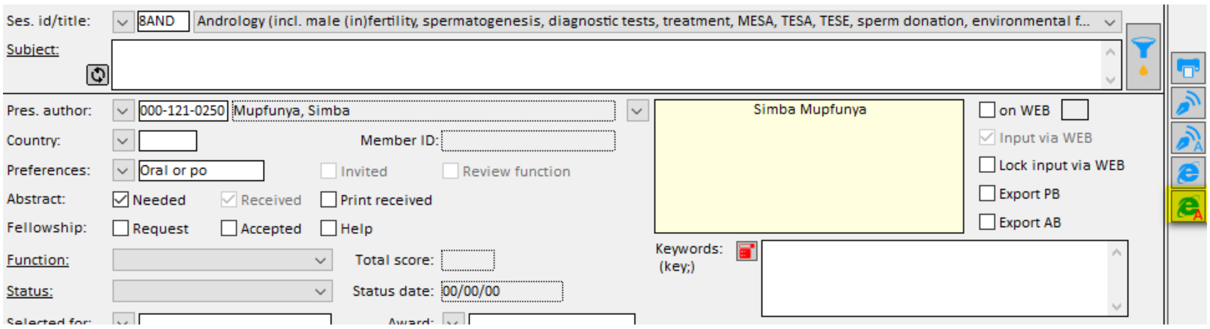
- use the view function

That's it folks!

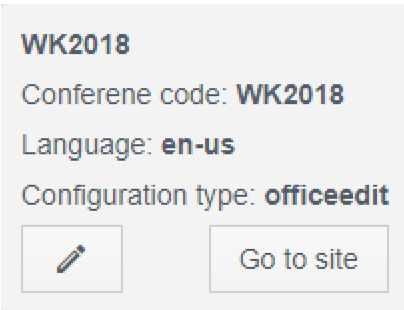
NEW: ABSTRACT EDITOR (OFFICE EDIT)

The abstract editor allows you to edit the contents of an abstract from within cmOffice.

If you open an abstract record within abstract functions you can use the yellow marked button to open the abstract editor.



The abstract editor opens an abstract submission configuration. This abstract submission config must be of configuration type "officeEdit".



In this "officeedit" config you can define which parts of the abstract will be changeable by selecting the views in the abstract submission startup view.

Steps to take to make use of the abstract editor:

A. create an officeEdit configuration in the abstract submission cmHost application of the congress
B. Define ABSeditURL in the admin table *default values

cmOffice – Scientific program

NEW: EXPORT – REVIEW SCORES

A new variable has been created that can be used in the html exporter. The variable is named <##TotalScore##> .

The other defined variables are:

<##Abstractnr##>	Abstractnumber
<##Pref##>	Abstract preferences
<##Title##>	Abstract title
<##TEXT##>	Abstract text
<##KEywords##>	Keywords
<##KEywords2##>	Keywords translated
<##Topiccode##>	Topic code
<##Topic##>	Topic description
<##SESSIONT##>	SessionType
<##SESSIONID##>	SessionID
<##images##>	Images in abstracts
<##ROOM##>	Rooms
<##SDATE##>	Session date
<##STIME##>	Session starttime
<##ETIME##>	Session end time
<##BREAKING##>	Late breaking info
<##PREFS##>	Long description prefs
<##REVIEW##>	Review overview
<##REVIEW2##>	Review overview foramt 2
<##REVIEWALL##>	-> special review overview
<##REVcomment##>	review comments only
<##PresentNR##>	presentationnumber
<##CatalogNR##>	catalognumber
<##SCORE##>	Scores
<##COI##>	Conflict of interest
<##email##>	email prest authors
<##Author##>	Co authors
<##AuthoOnlyr##>	Co authors without institutes
<##Country##>	Country pres author
<##LinkDocs##>	Linked documents
<##REMARK##>	Remarks
<##TRACK##>	Track **** new since vesion 2.74!
<##TotalScore##>	Total score **** new since vesion 2.84!

cmOffice – Relations - Registration

PROFILES IN FEE DEFINITIONS

In the web availability settings of profiles ("Show this extra ONLY for these profiles:") it is now possible to define a level 1 profile. All underlying level 2 profiles are covered by its parent level 1 profile.

In the previous version you could only select a profile level 2 definition. You now no longer have to repeat the setting for all level 2 profiles. The selection of a level 1 profiles captures all of its level 2 children.

BUG FIX: PROFILES SETTINGS

bug: The web availability settings of profiles ("Show this extra ONLY for these profiles:") is reset (in fact it is cleaned) whenever the web registration tickmark is switched (in the tab base info fee rate). This is now solved.

Do know that:

- once a “profile group” has been defined in cmOffice (admin table Relations / Profiles groups) it can never be deleted.
- As soon as you did create one “profile group”, you always do have to select a profile group in the creation of a new level 1. If you do not select a profile group, you will not be able to add a profile level 1 definition.
  This means that if you do want to select or add a level 1 profile that does not belong to any ““profile group” that you need to select the “empty” profile group. Once the empty profile group selected, you can proceed to add or edit a level 1 profile definition.

cmOffice – membership

DEDICATED MEMBER SUBSCRIPTION FEES: QUESTION CODE

A membership question code can be used to display a subset of the defined member subscriptions. One can compare it with the coupon code in the congress registration.

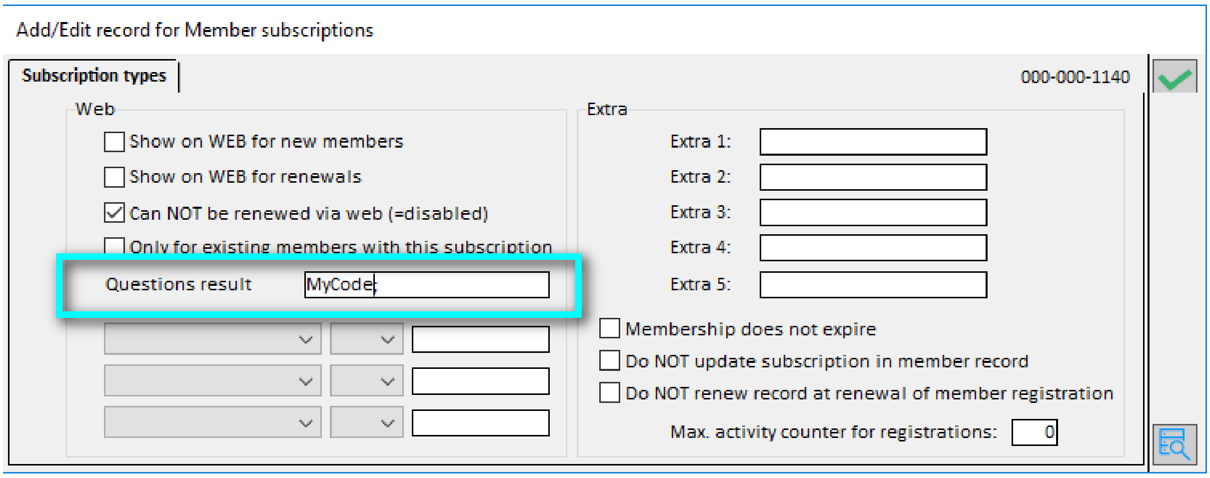
All member subscriptions having a specific code defined in cmOffice will be shown if that same code is also added in the membership configuration file.

Steps to take:

1. Define a code in the memberschip configuration file by adding the next parameter in the step with the identification that starts with “4C79C0363”

```
<step id="4C79C036-27C9-45D8-86C9-1FD2007682A2" order="1">
   <stepname>Please select your membership option</stepname>
     <parameters>
         <parameter type="Label" name="lblDefaultQuestioncode"
         visible="true">MyCode</parameter>
         .....
```

2. Apply the same code in each member subscription fee that needs to be displayed (in function of the code).
   - Open the admin table “Members / Member subscriptions”
   - File out the code in the window named “Questions result”



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An example:

If you are a member of association X you are entitled to a member subscription which is lower than when you are in association Y. If you are in no association then you get the normal member subscription fee.

In this case you need to define three different member subscription fees and you need to setup 3 different member configurations. One for the normal member subscription (no need to define a question code for this one) and two configs having a dedicated question code 5one for association X and another one for association Y)

cmOffice – GDPR

COVR'S ROADMAP TO GDPR

COVR created 2 documents: “Roadmap to GDPR compliance of cmOffice and cmHost Web application” and “cmOffice-cmHost GDPR compliance overview”. The first one identifies many areas where our software was already GDPR compliant, and several requirements where the software did not yet provide features to comply with GDPR. The second one shows the updated status as of 1 May 2018.

In addition to using systems which provide all features to work in a GDPR compliant way, organisations must also put in place policies and procedures which define how staff should treat customer data. While we are fully willing to participate in discussions regarding policy and procedure development, these particular document focuses solely on requirements which impact cmOffice and cmHost Web Applications.
Additionally, the impact of GDPR on general IT infrastructure (server security, hosting, network security, etc) is not covered in these documents.

Both documents are available in http://www.covr.be/downloads/reference.

DETAILED cmRegistration - cmMembership

COMBINED MEMBER SUBSCRIPTION AND CONGRESS REGISTRATION

With this feature it is possible to subscribe as a member and perform a normal congress registration in one go.

Add the next step between the Delegate and Delegate Profiles STEPS in the congress registration configuration XML:

```
<step id="7C2FB1E9-3895-49C6-9B87-26949A237E5F" visible="true" order="0">
<stepname>Membership Subscription</stepname>
<parameters>
        <parameter type="Label" name="lblExtraText" visible="true">Header</parameter>
        <parameter type="Label" name="lblExtraTextFooter" visible="true">Footer</parameter>
        <parameter type="Panel" name="pnlMembershipRegistration" visible="true">Membership subscription</parameter>
        <parameter type="Label" name="lblNoFeeAssignedMsg" visible="true">&lt;b&gt;&lt;p&gt;There are current no membership subscription fees defined in the system!&lt;/p&gt;&lt;/b&gt;</parameter>
        <parameter type="Label" name="lblRenewMembershipMsg" visible="true">Renew Text (HTML)</parameter>
        <parameter type="Label" name="lblBecomeAMemberMsg" visible="true">Become a member Text (HTML)</parameter>
        <parameter type="Label" name="lblRenewMembershipButtonText" visible="true">Renew my memberqhip</parameter>
```

```
<parameter type="Label" name="lblBecomeAMemberButtonText" visible="true">Become a member</parameter>
<parameter type="Label" name="lblFeeDocMsg" visible="true">&lt;b&gt;The selected fee requires an associating document. Click the upload button below to attach the fee document(s).&lt;/b&gt;</parameter>
<parameter type="Label" name="lblFeeDocButtonMsg" visible="true">Upload document(s) ...</parameter>
<parameter type="Label" name="lblFeeUploadMissingTitle" visible="true">cmRegistration</parameter>
<parameter type="Label" name="lblFeeUploadMissingMsg" visible="true">The fee selected requires an uploaded image</parameter>
</parameters>
</step>
```

Good to know

- online member subscription and registration should only be activated for **INDIVIDUAL** registrations.
- In the registration page this step can be skipped (visibility is **false**). Not necessary to become a member.
  <step id="7C2FB1E9-3895-49C6-9B87-26949A237E5F" visible="**false**" order="0">
  <stepname>Membership Subscription</stepname>
- When you do use this member subscription the page will keep your member selection in mind (for example Student membership) and will also show relevant congress fees. (in this example main programme student -member fee). If you skip the member subscription you will get the non-member congress fees.
- Member document upload is possible in the member subscription phase of the registration if the definitions of the member doc upload (defined in the cmMemberschip config) is also added in the registration configuration file.
- At the end of the registration the member subscription and congress registration must be paid together in one invoice.
- If not paid (0-balance) and if you have the possibility to edit your congress registration, the member subscription will not be visible anymore. When the member subscription wasn’t paid yet you will see the non- member congress fees on edit in the congress registration page.
- If you did not pay your member subscription in the combined registration page you can only pay your member subscription via the member subscription pages. Not via the congress registration page anymore.
- In cmOffice: when you do a combined registration, there will be a separate registration- (module registration) and member subscription (module members) record.
- Profiles defined for members can also be used in the combined member subscription and congress registration i.e. in the registration configuration.

Paying an online member registration and registration in one action

It’s now possible to become a member during the creation of an online registration. After submitting this registration everything can be paid with one credit card payment. cmOffice will create an invoice for the registration and a second one for the member registration. Both invoices will have the same Customer payment reference and Provider payment reference.