COVR B.V.B.A.

COVR B.V.B.A. Release Notes cmOffice – Release 2.81 build f

Author	COVR BVBA
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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 <u>http://www.covr.be/downloads/reference</u> 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)

cmOffice				
File Edit Help				
Name/ID: vanoppen		Type: 👻		Rece
Rel. ID Name	Zip City Count			
18296 Vanoppen Lu		TY		
-				
Select Vanoppen Luc	0			
7		2		
Link COVR byba (A	filiation-Person)	2		
7		2		*
Link COVR byba (A	ffiliation-Person)	2 Position		*
Link COVR byba (A Existing links C M Name De	ffiliation-Person)	Position		· ·
Link COVR byba (A	ffiliation-Person)	Position)	
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Link COVR byba (A Existing links C M Name De	ffiliation-Person)	Position)	



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 ¹ displays the next info:

in children				
File Edit Help				_
			Existing relation link 0000118296	
Relationlink dat				
Affiliation: 👻	COVR byba	Person: 👻	Mr. Luc Vanoppen	$\overline{\mathbf{x}}$
	Ouder Transitraat 5 2490 Balen Belgium			
	phone: +32 (14) 21 22 23 fax: +32 (14) 21 22 24 e-mail: info@covr.be urf: www.covr.be		E-mail luc@covr.be	+
				~
Link type:	Affiliation-Person		Mr. Vanoppen	
Depart.:			COVR bvba Mr. Luc Vanoppen Oude Tramstraat 5 2490 Balen	
Mail type:	V No mail		Belgium	
Telecom 1:	▼ phone: 3214 21 22 23			
Telecom 2:	▼ fax: +32 (14) 21 22 24			
Telecom 3:	v mobile:		phone: 3214 21 22 23	
Telecom 4:	e-mail: luc@covr.be		fax: +32 (14) 21 22 24 e-mail: luc@covr.be	
Telecom 5:	v uri:		phone: +32 (14) 21 22 23	
Country (link):	▼ BE Belgium 2490		fax: +32 (14) 21 22 24	
Incl. in address:	Relation 1 Depart.: -> show before name		e-mail: info@covr.be url: www.covr.be	
	Relation 2 Print name rel. 2 first			
Main relation:	O Relation 1 Relation 2		WEBSICMOFFICE - PRIMWUNI - MAINBOTH - IUGGOTHER -	
Use	relation 1 Orelation 2		IUGGIUGG - IUGGIECM - IUGGIAVCEI - IUGGIAHS - IUGGIAGA - HIGHDBACH - EESwoUniversity - EESreOther -	
	☑ Is contact address for person □Don't use this link any more		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

Show:		Persons	Companies	
Relation info	Profile / lo	gin / communication	_	8
Name pe	rson/comp	any:		
🗌 (Comp.) n	ame in ado	tress:		NEW
Relation	type:	~		
City:				

note: this function can also be selected via

🙆 cmOffice - [Relation manager]
File Edit Help
🚨 Persons
Company (in address): v covr
Name/relation ID:
Name/relation ID:
Company (in address):
Communication:
000-000-0510 DE W N
000-000-0460 CEENS

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 **Click** on **CK**" in the Printer Setup window and on **CK**" in the Print window.

Mail me	erge		
Print	Mail Ma	ail attachments Memo only	, j
Select m	emo type	Awards 2013	~ 6
Doc.	Seq.	Stylesheetname	
4DWP	0	ECNP Neuropsychopharmacology Award & Media Award documents	^
4DWP	50	Review applications ECNP Fellowship Award 2013	
4DWP	50	Review applications ECNP Fellowship Award 2013	
4DWP	210	ECNP Fellowship Award 2013	_
4DWP	230	ECNP Fellowship Award 2013 - outcome	
			_
			_
Gener			
		Process	
	Save do	cument as a memo	
	Do not	print/mail/create if 'No mail' is checked O Automatic	
		On Server	
Г	Load da	ata for profile: 🗸	

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 slidebar(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).

🗿 cmOffice	
File Edit Help	
Manual mailing	
Document Mail Attachments	Edit member registration
Relation ID: 000-011-9630 De Win, Ken	Prof. Ken De Win Altrecht GGZ
Memo type: Awards-13 Memo covr/GE/86240	Sales
Description: ECNP Neuropsychopharmacology Award & Media Award d	Nwe Houtenseweg 2
Select memotype V Insert stylesheet Insert variable	
ECNP Neuropsychopharmacology & Media Award	
To the members of the ECNP Award Committee:	
Julien Mendlewicz, Belgium, chair	
Kaj Blennow, Sweden	Font: Arial ~
Philip J. Cowen, United Kingdom	Style: Bold 🗸
Guy Goodwin, United Kingdom	Size: 11 pt
Andreas Heinz, Germany	
Michel Le Moal, France Georgio Racagni, Italy	Color:
Jari Tiihonen, Finland	Background:
CONFIDENTIAL	Style: 🗹 Bold
	🗌 Italic
	Linethrough
Dear members of the ECNP Award Committee,	Underline
The meeting of the Award Committee will take place on	Line: Solid 🗸 📈
Saturday 9 March 2013 from 8:30 – 11.00 hours	Color:
Room Mont Alban	
Created by: covr on: 11/07/2017	
Modified by: on: 00/00/00	a di seconda



NEW: HOTEL DEFINITION: DEFAULT CHECKBOX

A user is now able to use the checkbox "Default selected". In previous versions this checkbox did not containt 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, ...

Hotel basic in	fo F	tooms + Hote	el documents	Conference agreen	nents Rese	ervations						
Hotel name:	Hote	I Tivoli Orie	ente									
Conference:	~	isbon 2015]							
Room prices:		1	Roomtype:									
Conference	Rot	Hotel confe	erence agreen	nent								
LIS2015	Sin	Hotel agree										000-00
LIS2015 Do LIS2015 Sin LIS2015 Sin		Conference Date: Currency: Price:	E Lisbo Lisbo Lisbo Lisbo Lisbo Lisbo Lisbo Lisbo Lisbo	/15	tht	No. o	Roomtype: f available rooms: Commission (%):		ngle 10 0 st nigh	0	sit	
		Fees:	Description	Fe	e	Extra code	VAT type	Acc.	Pers.	Night	Inv.	Def.
			Standard		100,00	HOT1	TREGIS			•	•	• •
			Luxury		200,00	HOT2	TEXHIB		-	*	•	-

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 relatied 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

om CmOffice

File Edit Help													
Conception of the conception o													×
Invoice / Credit note Extra info Payments								E	dit Invoic	e/creditnote:	000-000-	0228	~
Company: 🗸 ESHRE]		Type: 🗸	Invoi	ce	No.: 20150	00528	Co	onf. No: 2	2015PT0012			×
Conference: 🗸 Lisbon 2015		N	ot linked: 🗸]		OGM: +	+++515/0000/228	883+++	!	
Inv. Rel. ID:								~					6
Cont. Rel. ID: 🗸													
Invoice Type: REGIS	Invoice	date: 10/0	2/15										
Payment: V Online credit card	Curr	rency: 🗸	EUR										
VATnumber:													
Cust. ref.:		Cust. d	ode Acc.:		St	tatus: O-Balar	nce		Date: 1	12/01/15			
Cust. PO: cr000228					Pa	ayment result	t: 131016309	3	Α	ACCEPT			ā.
Description	QTY Ur	nit price	Debit excl.	VAT%	VAT	Debit incl.	Credit cur.	Credit	PM Cur.	PM Debit excl.	ΡΜ ν	+	_
Main programme (E) / Member	1,0	300,00	300,00	23,0	69,00	369,00		0,00	EUR	300,	οο ε	2	
PCC 6 - Reproductive Endocrinology / Member	1,0	100,00	100,00	23,0	23,00	123,00		0,00	EUR	100,	00 2	前	
												ш	

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 owv 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 by. Testcompany BE with an address card in which no contact person is fillde out.

Relation details	Addresses	Communications	Logon details								
Addresses					Test	tcompany	/ BE				
Garden of Eden 1 1000 Brussels Belgium		^ [Type of address :	Company			Invoice	Ý	Sor		
			Use person: Contact person:				~				
			Department:								
					Address line: Address line2:	Garden of	Eden 1				
			Zip - city - extension:	1000	Bruss	els					
			State:								
			Country:	8E B	elgium				~		
			Carlot Control	-							

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

Testcompany BE	
Garden of Eden 1	
1000 Brussels	
Belgium	

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.

🖸 cmOffice : Covr : Invoices										x					
Invoice / Credit note	Extra info Payments								Edit Invoice/creditnote: 000-028-1030						
Company: 🗸 ESH	ESHRE Type: Invoice No.: 2017-00042							2 Conf. No: PT20151005							
Conference: 🗸 Lisb	v Lisbon 2015 Registration No.: v LIS-5036								OGM: +++117/0281/03086+++						
Cont. Pal. ID: V. 000-120-7400 Testnerson1. Adam							stperson1, Ada estcompany Bl est departmen			0					
Invoice Type: REGIS 37443 Invoice date: 28/06/17 Garden of Eden Payment: V Currency: VEUR Belgium								n		1					
VATnumber: BE0466505761															
Cust. ref.:	Cust. code Acc.: 37443 Status: 0-Balance						Balance	Date: 27/06/17							
Cust. PO:	Payment result:							esult:							
Description	QTY Un	nit price	Debit excl.	VAT%	VAT	Debit incl.	Credit cur.	Credit	PM Cur.	PM Debit excl.	PM VAT	PM Debit incl.	PM C	÷	
Hotel1	4,0	100,00	400,00	0,0	0,00	400,00		0,00	EUR	400,00	0,00	400,00	C	2	

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



b) Suppose you do have a company by. 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.

OGM:	
Barack Obama Donald Trump	Donald Trump Testcompany US U.S.A.

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.

Programme	≡										
Welcome	🔶 Exp	port to PDF			Sessio	n Schedu	ıle		2	Q Filter	2
E Session List	Tues	day, April 4	th Wed	nesday, Apr	il 5th Thu	ırsday, April	6th Frida	ay, April 7th			
Abstract List		Zenit +	Zenit	Nadir	Qaud	Leo	Virgo	Day T Taurus	imeline	Agenda Poster	-
	08 00	Nadir	Zenit	Naun	Qauu	Leo	Virgo	laurus	Aquar	Area	Legend
	0900	Plenary II & III				MOSAiC Workshop	MOSAiC Workshop	MOSAiC Workshop	MOSAiC Workshop		
	10 ⁰⁰										

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.

