

## File Smart Version 8 Release Notes

### Upgrading

Make sure to upgrade to -

- Rest Professional Version 18.5
- Strata Master Version 12.5

prior to upgrading File Smart to Version 8.

Check the [File Smart Upgrade Guide](#) to ensure a smooth installation of the latest version

File Smart Version 8 was released in conjunction with Strata Master version 12.5. If you use Strata Master you must upgrade to the latest version of Strata Master BEFORE upgrading to File Smart Version 8.

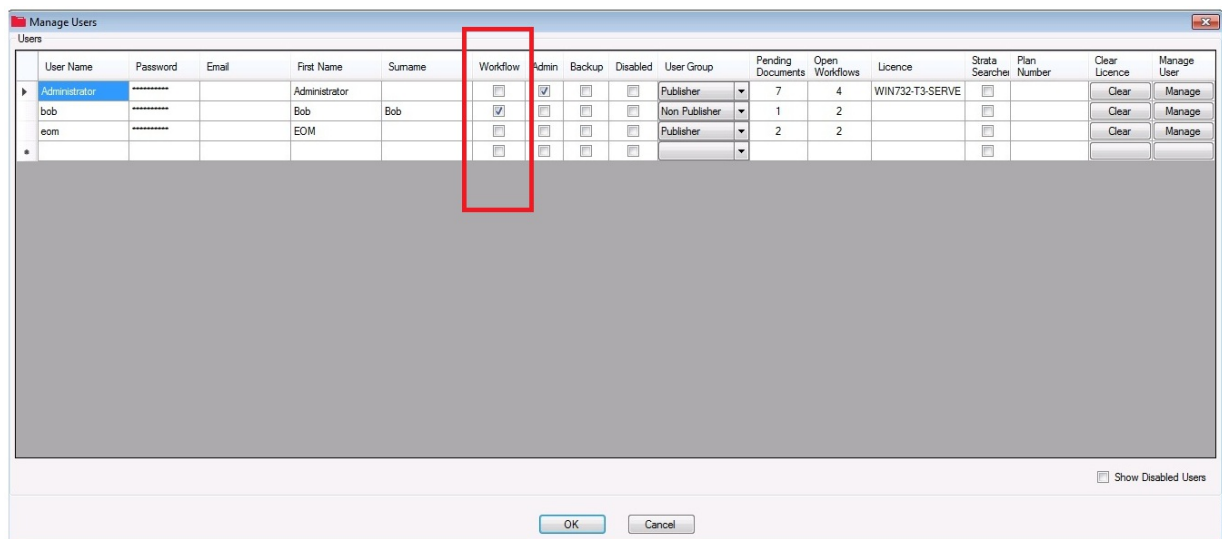
### Feature Summary

#### Improvements to Search Mode

The plan number will now be retained when navigating to different folders when in search mode.

#### Workflow User Access Right

A new Workflow User Access right has been added to the Action > Manage Users screen



When the new workflow option is ticked for a user, they will be granted admin access to the workflow functionality, removing the need for general admin access rights.

When a user is granted workflow access rights, they can see all the workflow items in the “All users” of the workflow list.

The screenshot shows a 'Workflow List' window with a filter menu at the top containing 'My Queue' and 'All Users' (highlighted with a red box). Below the filter is a table with columns 'Date', 'Assigned', and 'Workflow'. The first row is selected and highlighted in blue.

	Date	Assigned	Workflow
<input checked="" type="checkbox"/>	10/01/2014	eom	Ad-hoc
<input type="checkbox"/>	13/01/2014	Scott	Strata Invoic...
<input type="checkbox"/>	13/01/2014	Scott	Strata Invoic...
<input type="checkbox"/>	14/01/2014	Administrator	Ad-hoc
<input type="checkbox"/>	14/01/2014	Scott	Strata Invoic...

Below the table is a 'Select All' checkbox and the text 'Selected: 1, Total: 5'. Underneath is a 'Workflow Details' section with a table of properties and values.

Property	Value
Folder	Owners Corporation
Workflow	Ad-hoc
Created By	Scott
Created On	10/01/2014 5:34:52 PM
Assigned From	Scott
Assigned To	eom
Assigned On	10/01/2014 5:35:55 PM
Comment	not for me
Status	Open

Note that the Assigned column is showing workflow items that belong to both “Scott” and “eom”. This is only possible in the All Users list and that list is only accessible for users with Workflow or Admin access rights.

It is quite likely that users using the All Users work list will see large numbers of items in the list and the filtering feature will be used to restrict the list to only what is important.

The workflow user has access to the same filter screen as a regular user except that they can also filter on the responsible user as shown here:

The 'Filter' dialog box contains several filter criteria:

- Workflow: All
- Date Created From: [empty]
- Date Created To: [empty]
- Responsible: Administrator (highlighted with a red box)
- Status:  Rejected,  Completed,  Open

Buttons for 'Ok' and 'Cancel' are at the bottom.

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