SIMON TOWELL

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Logical Office Evolution Update

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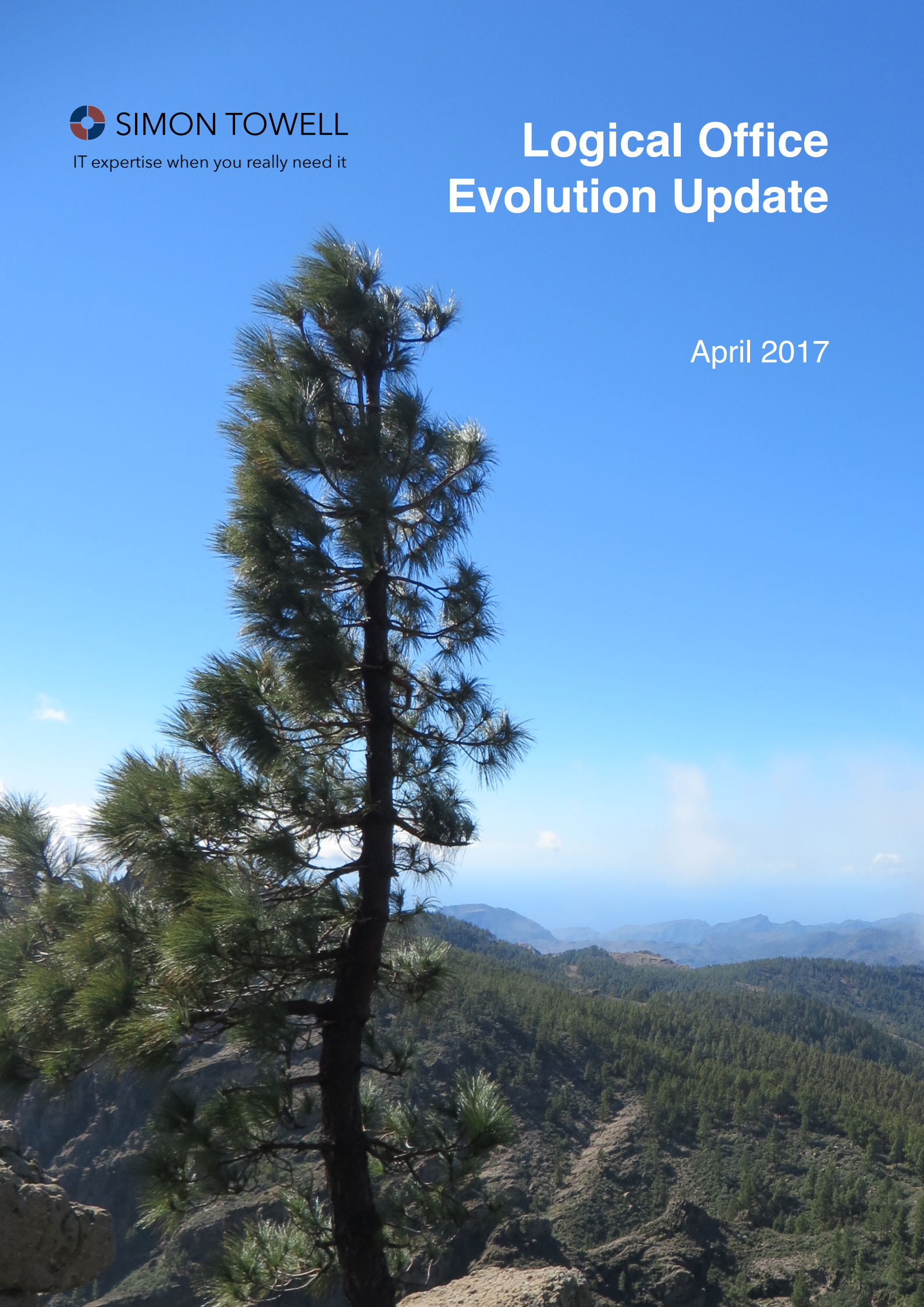

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Simon Towell	IT Specialist	Author
		Contributor
		Reviewer
		Approver

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Simon Towell	Author	Prodata UK
	Senior Partner	Client
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1 Preface

1.1 Purpose

The purpose of this document is to outline the issues facing a client and possible resolutions in relation to the post-migration business processes required from the Logical Office Evolution application installation.

1.2 Terms and Abbreviations

Term	Description
XLSB	Excel binary (BIFF12) 2007+ format (with or without macros)
XLSX	Excel non-macro 2007+ XML format
XLSM	Excel macro enabled 2007+ XML format
XLAM	Excel add-in 2007+ XML format
XLTM	Excel macro enabled template 2007+ format
XLTX	Excel non-macro template 2007+ format
XLS	Excel 97-2003 format (with or without macros)
XLA	Excel add-In 97-2003 format
XLT	Excel template 97-2003 format
XML	XML 2003 data format (eXtensible Markup Language) much like HTML
HTML	Hypertext Markup Language format for web pages
SBS	Microsoft Windows Small Business Server
SQL	Structured Query Language normally referred to as “Sequel”
TS	Microsoft Windows Terminal Server now renamed to Remote Desktop Services
RDP	Remote Desktop (client software for accessing a server remotely)
CSV	Comma Separated Variable
ASCII	American Standard Code for Information Interchange

Note: The Excel 97-2003 formats (with the exception of the XML format) were saved as binary (BIFF8) files.

Special Note: The XLS file extension was also used for the Excel 5.0/95 binary file format (BIFF5).

2 Introduction

2.1 Background

Following the migration to the Logical Evolution product it has been identified that:

- identifying a client's unique ID (folder identifier) requires showing a separate screen which when issues occur may be impossible to show (see above).
- any Excel workbook in the XLSX format which cannot be previewed (presumably due to memory constraints) causes the application to crash.
- importing a new Excel workbook to a client code which then becomes the first document prevents access to the client thereafter if the product is unable to preview the file.
- sent emails can no longer be forwarded from within the product and appears as if they are new emails ready to be sent.
- importing emails no longer distinguishes between those that have been sent and this that have been received.
- some data migration has resulted in incorrect display of data e.g. a text field showing a date in the format "dd-mmm" has been created as an unusable date field in the format "dd/mm/yy".
- relationships does not show adequate information on contact names to uniquely identify a contact where both initial and surname are identical e.g. Simon Towell and Shaun Towell would both be shown as S Towell.
- the inability to format numbers in templates results in output which looks unprofessional and may damage the reputation of the business with both clients and other third parties.
- there is a severe lack of product documentation to aid in the process of familiarisation with the new product.
- sluggish performance loading client codes with a large document history.

2.2 Current Environment

The business has two servers running on Windows Server 2008 R2 Operating Systems:

- Small Business Server 2011 Standard (SBS2011)
  - Exchange Server 2010
  - SQL Server 2012
- Terminal Server (TS)
  - SQL Server 2012

Application software includes Office 2013 for Outlook, Word and Excel documents of which are being managed within the Logical Office Evolution product.

3 Investigations

3.1 Identifying documents

The original source documents are now stored by organisation or individual in a unique folder as follows:
- ORG-{unique id}
- CON-{unique id}

where {unique id} is the id assigned to the account code when originally created and **ORG** are **organisations** and **CON** are **individuals** (contacts hence the use of CON).

Each folder is held on the **SBS2011** server in the **EvolutionData\Atts** master folder.

Each document is given a unique number and prefixed by the account codes unique id, for example:

2458-233.xlsx

where this is an Excel workbook held in the **ORG-2458** folder (the account code for this example is **AAMONTH**).

Recommendation
The task of identifying documents would be easier within the product if the **Unique Id** for the Organisation or Individual were displayed on the main screen (with the account code).

3.2 Some XLSX documents cause application crashes

The selection (or automatic selection where the document is the first one in the history) of an XLSX type document can cause the application to crash either immediately or sometime thereafter. This can be identified by the document history pane being replaced by a box with red diagonal lines and then other panes exhibiting the same behaviour. Eventually the application crashes.

Note: Although this behaviour was indicative of an XLSX type document being selected, there is potential for other types of document to create the same situation.

Tests appear to suggest that the application attempts to **preview** the document and where there are a large number of rows/columns in an Excel worksheet there is insufficient or badly managed memory for the task to complete resulting in a total failure.

However, where the document type is one that cannot be previewed a message appears in the preview pane to that effect and there is no adverse behaviour.

Recommendation
There is not normally a requirement to preview an Excel workbook except perhaps to identify it's purpose. The application should not crash, so perhaps a partial view would be preferable or none at all (as with other document types).

Workaround
Rename the Excel workbook to an alternative type such as XLSM or XLSB.

3.3 Sent emails appearing a new emails

Functionality has drastically changed in this version of the application to the extent that it is now not possible to determine when an email has been sent except by reference to the Outlook Sent Items folder. This is a retrograde step in the displaying of email documents within the application where useful information has been lost between application versions.

In the previous version of the product the **Forward** option was available to re-send the email and there was a proper audit trail within the email document itself to identify date and time of each occurrence. In the new version this is now not possible.

Recommendation
Reinstate the sent email status rather than create a situation where a sent email becomes a completely new email. Forwarding is a better way to deal with the situation than to re-send as if it had never been sent in the first place.

3.4 Identifying the sent or received status of an email

Displaying the history of email documents within the application no longer identifies the type of email i.e. sent or received.

Recommendation
Reinstate the functionality as per the previous version of the application. Outlook stores emails in the Sent Items and Inbox, so this information should be available within the history pane of the application for each message style document.

3.5 Year end text field

Every organisation or individual has a year end day within the month which is normally the same from year to year. Thus, it does not contain the year and is normally held as text data or a special data type i.e. year-end.

During migration the importing of these year-end dates may have been an operator mapping issue and thus requires correction.

Recommendation
Within the application the import routine should allow for a "look-a-like" date to be interpreted correctly and not assume it is a date type just because it looks like one (if this was not an operator error during the mapping process).

Workaround
By creating a user defined text column on the relevant Logical Screen it may be possible to re-import just this one piece of data and then after the import has completed remove the erroneous user defined data styled column.

3.6 Identifying individuals within relationships

The application does not display all the information required to uniquely identify a contact name when viewing relationships.

Recommendation
Not being able to uniquely identify a contact is not acceptable and the addition of **title** and/or **first name** may alleviate this issue in the majority of cases.

3.7 Template issues

Whilst templates can be used for the creation of documents, emails, SMS text messages and Excel workbooks there are some limitations.

Merge codes do not always work as expected and some do not work at all in Excel workbooks including totals, balances and statement tables. Also numbers are not formatted but are displayed as stored i.e. without commas or currency symbols.

It is unacceptable to send out correspondence containing numbers without correct formatting.

Recommendation
It might be feasible to add a selection dropdown as part of the company setup screens with the various formatting options on a global basis or (and probably preferable) would be to use the current Windows Regional Settings for number formatting.

Workaround (partial)
Within Word it is possible to bookmark and reference table rows and columns. It may be feasible to hide a table containing merge codes and show a another table containing new references to the merge code cells and format appropriately. This might work for merge codes

which contain references to a single number but cannot be used for those creating tables of numbers.

3.8 Lack of full documentation

There appears to be little or no documentation on the fundamental workings of the application, especially in the area of global events and workflow design. Many essential business processes require design of workflows which without documentation are a monumental task.

Whilst there are a number of pre-defined workflows these appear only to work on a single event basis but many processes require a global event/workflow scenario.

Recommendation
There needs to be basic workflow documentation so that users do not have to rely on Logical Office for essential business process design which may change from time to time and require amendment as circumstances dictate.

Workaround
The immediate provision of example workflows may alleviate the lack of documentation and give the business process owners a chance to use with amendment simple workflows.

3.9 Sluggish performance

Some users have reported sluggish performance when comparing the new version with the previous one.

Although further investigations may be necessary it was noted that the application is using SQL Server within an SBS 2011 Standard environment.

Microsoft in the past have recommended separating onto different servers or re-configuring environments requiring both Exchange and SQL Servers.

Recommendation
Where both Exchange and SQL Server are running on the same machine it may be necessary to cap the memory used by SQL Server to ensure that Exchange Server has enough memory to use.

It is also recommended that Exchange and SQL perform independent IO i.e. separate volumes for Exchange, SQL Data and SQL Logs as a minimum.

Purchasing the Windows SBS 2011 Premium Add-on for a second server machine or utilising an already existing second server is the recommended Microsoft solution to the issue i.e. separation of concerns.

3.10 CSV file import

Import from Excel workbooks via the CSV format may require formatting of individual cells to make sure that the data is compatible with the application.

The CSV format uses special characters to determine the type of data and identify individual columns as follows:

- quotation marks and apostrophes (' or ") are used to enclose alphanumeric data such as names and address information
- commas (,) are used as a delimiter to identify columns
- the carriage return and line feed characters (ASCII codes 13 and 10) are used as end of row markers

Thus, any of the above characters which are not used for the purposes above must be removed or replaced by alternative characters. For example, spaces could be used in an address where it was originally made up of multiple lines, so that it reads as one line.

4 Workflows

4.1 Event workflows

It has been identified that a workflow can be attached to an event type for single type events such as filing account reminders, VAT return reminders and so on.

Most (if not all) of the prebuilt workflows and accompanying documentation are of this type.

4.2 System wide workflows

To be able to attach a workflow to both organisations and individuals on a system wide basis appears to be possible by using the Mail shot facility.

The documentation states that this feature can be used to create a set of results from a mail shot style process for both Organisations and Individuals but NOT BOTH at the same time.

However, in the **Results** tab you can select multiple accounts and then click **Manage** to make changes to them including adding a workflow.

Thus, it should be possible to create a **Monthly Statements** workflow and attach it via this feature to all accounts.

Note: Although not tested this feature appears to suggest you can add workflows to both types of accounts simultaneously from the **Results** tab but **cannot** create a results set with both types from the **Mailshot Setup** tab (radio button rather than a checkbox for selecting type of account).

This seems to suggest that you can do it but in two steps i.e. once for **organisations** and then again for **individuals**.