Project Release Notes

Release 4.10 (October 2022)

What's New

Extended User Object

Using "Extended User Object" feature, you can now add additional information about the user that are not available in our default "User" object.

More...

Record Queuing

You can now create a record queue with criteria to automatically manage user level tasks flows such as assigning records, controlling record availability and prioritizing tasks. Based on the current record and its attributes, admin can control user's work flow in real time.

More...

Extended User Object

Using "Extended User Object" feature, you can now add additional information about the user that are not available in our default "User" object. Create or use an existing object that has all additional user information and link it to our "User" object through a reference field. The extended user object should have 1:1 relation with our "User" object to ensure one user has only one record from the extended user object linked to it.

How to set up an extended user object

Create a reference field in the object you like to use as an extended user object and set the reference field as our default "User" object.

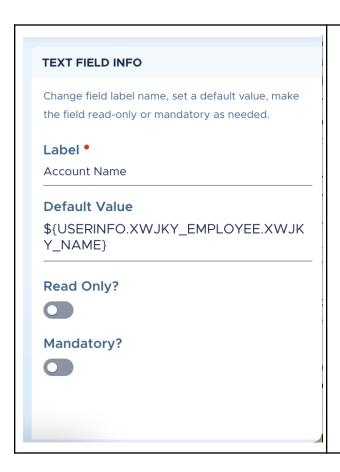
Then go to Company Profile —> User sign-up tab and choose the extended user object and the field referencing to our default "User" object.



Once this relation has been established, literal USERINFO.<ObjectAPIName>.FieldAPIName can be used to access fields from the extended user object.This is applicable to:

- 1. Field Defaults
- 2. Auto Line Create/ Update mapping
- 3. Expressions

Let's see how the literal can be used as a field default



- This is a field default set on a text field "Account Name"
- XWKJY_EMPLOYEE is the API name of the extended user object, and
- XWJKY_Name is the API name of a the field from the extended user object, the value of which we want to retrieve

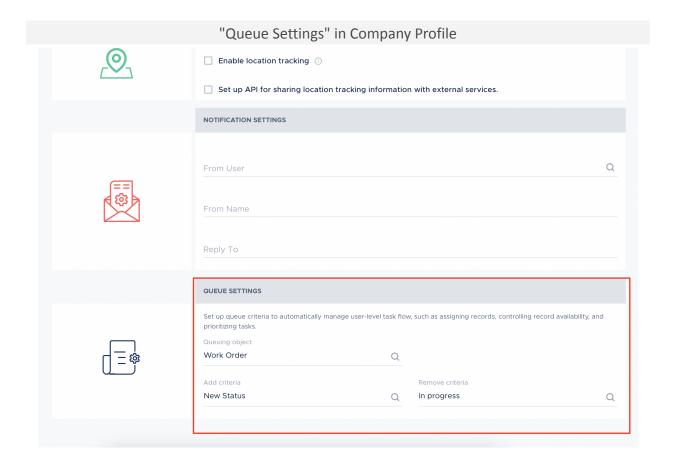
Record Queuing

You can now create a record queue with criteria to automatically manage user level tasks flows such as assigning records, controlling record availability and prioritizing tasks. Based on the current record and its attributes, admin can control user's work flow in real time.

For instance, the record gets added to the queue when the technician "Accepts" a task, i.e. when he updates the status to "Accept". The record is held in the queue until the status is modified to "Completed", after which it gets released.

Configuring Record Queuing

You may now configure a queueing object and add criteria for adding or removing records from the queue in the "Queue Settings" section of the "Settings" tab of the Company Profile page.



How to use Record Queuing

A new field 'CURRENTRECORDID' is added to the User object, which stores the record id of the queued record. The "CURRENTRECORDID" field of the user object is updated as soon as the user works on a record that satisfies the entry requirements. The value of the user field is also cleared for the logged-in user when the record satisfies the exit criterion.

Literal USERINFO.CURRENTRECORDID can be used to access this field's value in filters, defaults, Auto line create, Auto line update & Fork field associations.

In addition to this, in order to handle the null criteria, we can also use a java script expression \${APYCN('\${USERINFO.CURRENTRECORDID}' == ''?'\${CURRENTRECORD.TURBOID}': '\${USERINFO.CURRENTRECORDID}')}.

For instance, the action/action flow will operate with the default settings and the record queue will be empty if none of the records meet the Entry criteria. The user will have access to all records and will be able to perform any action on it. In case there are records matching the criteria, the record queuing as expected.