



## Product Release Notes

**Product Version:** 1.7.5

**Release Date:** June 2014



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## 1 About this Document

This document contains information about the features & functions that have been added, removed or updated in the Defero product.

## 2 Document Version Control

The version number of this document appears at the foot of each page. The following lists its change history:

VERSION	DATE	APPLIED CHANGES	AUTHOR
0.1	16 <sup>th</sup> April 2009	Version 1.0	Terry Byrne
0.2	07 <sup>th</sup> August 2009	Version 1.0	Rita Darcy
0.3	23 <sup>rd</sup> June 2010	Version 1.2.0	Rita Darcy
0.4	10 <sup>th</sup> November 2010	Version 1.3.0	Terry Byrne
0.5	30 <sup>th</sup> September 2011	Version 1.3.1	Victoria Faustova
0.6	17 <sup>th</sup> October 2011	Version 1.4.0	Victoria Faustova
0.7	15 <sup>th</sup> November 2011	Version 1.4.0	Victoria Faustova
0.8	14 <sup>th</sup> February 2012	Version 1.4.1	Victoria Faustova
0.9	1 <sup>st</sup> October 2012	Version 1.5.0	Victoria Faustova
1.0	15 <sup>th</sup> April 2013	Version 1.5.1	Victoria Faustova
1.1	1 <sup>st</sup> February 2014	Version 1.7	Kevin McNerney
1.2	11 <sup>th</sup> March 2014	Version 1.7.1	Victoria Faustova
1.3	25 <sup>th</sup> March 2014	Version 1.7.3	Victoria Faustova
1.4	13 <sup>th</sup> May 2014	Version 1.7.4	Victoria Faustova
1.5	11 <sup>th</sup> June 2014	Version 1.7.5	Victoria Faustova

## 3 Product Versions

VERSION NUMBER	RELEASE DATE	DESCRIPTION
1.0.0	June 2009	First production release
1.1.0	November 2009	Beta version of second production release
1.2.0	July 2010	Minor release
1.3.0	November 2010	Minor release
1.3.1	January 2011	Maintenance & enhancement release
1.3.2	May 2011	Maintenance & enhancement release
1.3.3	July 2011	Maintenance & enhancement release
1.4.0	Oct-Nov 2011	Minor release
1.4.1	February 2012	Minor release
1.5.0	October 2012	Minor release (with maintenance & enhancement)
1.6.0	November 2013	Minor release for browser enhancements
1.7.0	February 2014	Minor release (with maintenance & enhancement)
1.7.1	March 2014	Minor release (with maintenance & enhancement)
1.7.2	March 2014	Minor release (with maintenance & enhancement)
1.7.3	March 2014	Minor release (with maintenance & enhancement)
1.7.4	May 2014	MIF Archive Patch
1.7.5	June 2014	Correspondence/Responses Patch

## 4 Product Overview

Defero Advance Notification System is a new product from Grapevine Solutions that is designed to meet the demands for faster and more cost effective ways to communicate with your clients, customers of staff.

Defero provides clients with a suite of tools to configure and manage the delivery of structured messages to small or large numbers of recipients.

Defero also includes a number of tools to allow you to easily integrate Defero with your existing business systems and customer contact information.

## 5 Related Documentation

Defero includes a comprehensive suite of documentation which is available online from the Defero Help and Support options.

These documents may be used to obtain detailed information regarding the following topics: -

- Installation and Configuration
- Message Processing
- Mobile Number Validation
- Message Interface File Specification
- Contacts Interface File Specification
- Recipient Interface File Specification
- Submit Message Web Service Specification
- Defero User Guide
- Defero Super User Guide
- Defero Quick Start Guides

## 6 Version 1.7.5 – Minor Release (June 2014)

- Correspondence page is updated to show only Responses and any corresponding sent messages. Sent messages that have NO response will not be displayed. This is to reduce the amount of data displayed in the correspondence screen and make it more relevant to reviewing correspondence. Sent messages start date is calculated as the selected start date minus 5 days. The subheading of the Correspondence page is changed to “Displaying NNN correspondence records (Sent - N ; Responses - N)”.
- Responses page is modified to allow searching of records if the user who sent the messages is not a Defero user (e.g. ‘UNKNOWN’ user from MIF files). The start date for the corresponded Sent messages is the selected start date minus 5 days (configured in the system, can be changed).

## 7 Version 1.7.4 – Minor Release (May 2014)

- Added new functionality to ensure that a message interface file cannot be processed more than once. This validation is based on the MIF file name. A log of all files received is also retained within Defero. If an existing MIF file is submitted again, details will be saved in the events log and emailed to the client help desk.

## 8 Version 1.7.3 – Minor Release (March 2014)

- Updated Notification Setup page to allow using apostrophe in the Client Profile name.
- Fixed issue with percentage of Not Sent messages in message statistics screen not displaying correctly.

## 9 Version 1.7.2 – Minor Release (March 2014)

- Optimised Caché queries and methods for Message Archive and Resend Message pages.

## 10 Version 1.7.1 – Minor Release (March 2014)

- Submitted MIF files could have blank IssuedBy fields. In this case the value UNKNOWN will be saved as IssuedBy.

## 11 Version 1.7.0 – Minor Release (February 2014)

- Across Defero:
  - A new, more responsive calendar from which to select dates
  - On pages where the user can select the Batch Reference, the list is now generated on date selection (from calendar) instead of after the search
  
- Resend Messages screen:
  - A new screen that allows messages do be re-sent by users with privilege to do so
  - Search and filter the message archive for message records
  - Functionality restricted if user does not have privilege to resend messages
  - Messages older than set limit for user can't be re-sent. This can be adjusted by Defero administrators
  - Filter by Delivery Status
    - Sent: All
    - Sent: Received
    - Sent: Pending
    - Delivery Failure
    - Deleted
    - Expired
  - Also by Template ID, Issuer, Interface ID, Mobile Number and Start and End dates
  - Read message details
  - Check desired messages and click 'Resend Messages' button to add messages to the message queue
    - Confirm dialog to confirm you wish to send messages
    - Number of selected messages is displayed on the right of the screen
    - Checking the first checkbox in the header selects all checkboxes. Unselecting it unselects all
  - Export the results to an Excel spreadsheet
  - Re-sent messages are a new record and have a new Batch Reference (beginning with "RM"). The old message is also kept in the archive
  
- User's screen
  - Screen now gives option to allow user to resend message. Set limit of age of messages that can be resent for individual users
  
- Send Message screen:
  - Contact search is now always visible on Contacts tab
    - Press 'X' to clear Contact Search
    - If a group is not selected, cannot add all results (">>" button) to contact list to avoid mistakenly adding incorrect contacts
    - If a group is selected, this button works as expected

- Message Archive
  - No longer displays Delivery Failures panel, as this is facilitated by the Resend Messages page
  - Can now filter Message Status to include Delivery Failures
- Responses screen
  - The grid displaying responses header has been fixed to stay in position in all recent versions of Internet Explorer
- Submit File
  - Submitted MIFs must have a valid UserID in the 'Issued By' field which corresponds with a user defined in the Defero system, or the message will fail validation
- Templates
  - Authorise Template checkbox is now highlighted if not authorised. Only a user with the privilege to authorise templates can do so
- Queues
  - On the System Status displayed, Queues are now highlighted in red if stopped
  - In the event of a connection failure when sending a message, Defero will hold onto it and attempt to resend the message. If the issue is on-going, the Queues will be stopped
- Event Log
  - MIF Validation: System now checks to see whether a Template ID exists and whether it is authorised

## 12 Version 1.6 – Maintenance Release (November 2013)

- Fixed compatibility issues with new versions of Internet Explorer

## 13 Version 1.5.1 – Maintenance Release (April 2013)

- Request & Response timeouts increased to 5 minutes:
- Cache queries that select the TOP number of optimised to improve performance.
  - Client.MessageArchive
  - Client.ResponseArchive
  - Client.ContactDetails
  - System.EventLog

## 14 Version 1.5.0 – Minor Release (October 2012)

- Send Message screen:
  - A new option “Search for a Contact” added when Contact Group is selected. Search all contacts First Name or Surname.
  - Warning message & font colour changed
    - If all submitted messages are sent, message is in black colour.
    - When not all submitted messages are sent, message is in red colour, text is "Not ALL messages have been sent successfully! Total Records Submitted: NNN Sent: NNN Invalid: NNN"
- Upload Contact screen:
  - Error message text for uploading contacting file modified:
    - “Invalid records found in file. Upload cancelled. Please correct records & try to upload again”
  - Replaced: Select File: [choose file] with a button [Select Contacts Interface File]
  - When you click preview the following message appears: "The records have been uploaded successfully"
- Assign Contacts screen:
  - Message "Contacts have been saved to the Contact Group" changed to: “Contacts Saved to Contact Group”
- User’s Groups screen:
  - The text "Defero User can view:" changed to "Groups available to user " & \_username
- Custom Access screen:
  - The following prompt "Defero Users have been saved to view the Contact Group" changed to "Custom access saved for user(s)"
  - "Group Viewers" changed to "Users Assigned Access"
- Contacts Groups screen:
  - The text "Contact Group:" changed to "Groups selected User can Access"
- Message Statistics screen- tables’ fields changed:
  - Receipts count replaced with Received count
  - Added counts for Delivery Failed & Receipt Pending (when Receipt = ‘NONE’ in message archive)
  - Removed count Blocked by defero and Blocked by zamano
- Help documentation updated
- Upgraded Defero database to be compatible with the latest versions of Caché or Ensemble.
- Response Acknowledgement text is not reset when a new licence key added



## 15 Version 1.4.1 - Minor Release – (February 2012)

- Send Message Screen:
  - A Progress indicator ‘Please wait...’ added when buttons to Add/Remove to/from List (‘>’, ‘>>’, ‘<’, ‘<<’) clicked
  - New label added to display amount of Contacts in the Group selected “Total – NNN contacts in Group”
  - Existing ID key replaced with the new key ID in Cachè Client.RecipientList table (ID = RecipientID || MobileNumber).  
Thereby there is no need of checking for duplicating Numbers, and it is removed from the code behind the pages and speeded up transferring Contacts from the Group selected to the Recipient List
- A Progress indicator ‘Please wait...’ added when the SEARCH button clicked on the following screens:
  - Messages Queued
  - Message Archive
  - Correspondence
  - Message Receipts
  - Message Responses
  - Messages Statistics
  - View Events
  - Contact Details
  - Upload Contacts
  - Assign Contacts
  - Contact’s Groups
  - Custom Access
  - User’s Groups

## 16 Version 1.4.0 - Minor Release – (November 2011)

- When a record is selected from the search results, the screen automatically jumps to the top of the page. This applies to the following screens: -
  - Message Template
  - Master Template
  - Users
  - Contact Details
  - Group Details
  - Contact’s Groups
  - User’s Groups
- Message Template
  - The full text message contents (header, body & footer) is displayed in a single cell in the template list.

- To un-authorise a template, uncheck the authorisation flag and save the template, the template details stay displayed for further modifications.
- All Message Reports Screens, View Events, Contacts screens
  - Subheading changed from “Screen Name search results (N records found)” to "Displaying NN of NNN records found"
  - A new option to modify the maximum number of records you want to display in the search results grid has been included. The default number is 5000, to change this simply enter a new number and press the Search button
- Correspondence Screen & Message Response Screen
  - Response background colour changed to the brighter yellow colour
- All Message Reports Screens & View Events Screen
  - Changed text for empty grids from “There are no records” to “Select search to display records”
  - Default views all message report screens changed to display NO records. To display records simply select Search or select different search options and select Search.
  - Sort order for search results in default view changed as follows:
    - View Events (order by Event ID descending)
    - Messages Queued (order by Message ID descending)
    - Message Archive (order by Message ID descending)
    - Message Receipts (order by Receipt Date, Receipt Time descending)
- Statistics Screen
  - Fixed calculation of Receipt % value (divide by Sent messages, not Total messages)
- Send Message Screen
  - Field Validation added for to the Message Body textbox
    - Blank Message Body text cannot be sent
    - Message text cannot contain curly braces, all {message\_field}'s should be updated or removed if not required
  - Field Validation added for to the Message Field textbox, blank text fields cannot be inserted into the message body text
  - Field Validation does not apply to recipients uploaded from a recipient file.
- Contacts Screens
  - Default view changed for all contact screens to display no search results. To display records simply select Search or select different search options and select Search
- Queued Messages Screen
  - Changed default date selection for queued messages to display the submission date of the earliest message that is still pending on the Message Queues.
  - To display records simply select Search or select different search options and select Search.

- Message Response & Message Archive Screens
  - Resolved issue sorting by date & time
  
- Active Directory Users
  - Resolve lost connections for Windows Active Directory users.
  - Automatically refresh the Defero web application if the Windows Active Directory user has lost their network connection to the Defero database server. This will automatically login the Active Directory user to Defero.
  
- Defero Database Performance
  - Add new indices to the following tables to improve performance for database searches
    - Message Archive
      - MobileNumber
      - RequestStatusCode
      - TemplateID
      - IssuedBy
    - Response Archive
      - ResponseDate
    - Client.ContactDetails
      - ContactDepartment
  
- Contact Details Rules Change
  - Allow client users to view contacts in their department
  
- Client Server/SMS Gateway Connection Failure
  - Modification to error handling when sending text message to the SMS gateway over HTTP.
  - Error procedure is to send an email when the error occurs to the support email address defined for the client site & stop ALL message queues so no further text messages are sent until the issue is resolved.
  
- Response Screen
  - Correspondence Email
    - The text in the correspondence email sent from the response screen has been modified. The following new text has been inserted
      - “The email message was sent to you from Defero by USER and contains the correspondence history for mobile number 3538xxxxxx”
    - Notes included in the email message.

## 17 Version 1.3.3 - Maintenance Release – July 2011

- Background colours for all selected records and Sent / Response messages on the Correspondence page and Message Response page are changed:
  - Sent messages have light grey background colour and dark grey font colour
  - Response messages have yellow background colour and black font colour
  - Selected row has green background colour on all pages
- All Responses (not only Responses that have matching Sent Messages) received by Defero are displayed on the Response page for the selected dates.
- Do not save the event in the system event log when the message has been reviewed on the Correspondence page or Message Response page.  
Save the event only if there is an error updating flag.
- Removed read-only from the message body on the Send Message page if there are {message\_field}'s in the selected template to let the user add a text in the message before send the message.

## 18 Version 1.3.2 - Maintenance Release – May 2011

- Do not save any Responses in Defero that contain the text 'STOP' on its own
- The existing email text layout changed (forward Correspondence history)
- On the Message Response page when an email was send the text was changed to "Correspondence Email Message sent to {email\_address}"
- Changed the SMS Provider settings page to enable to create a new SMS Provider
- Default Source Mask added on the Client Profile page
- Changed the Licence Manager - acknowledgement details moved from the Licence page to the System Settings page.  
If the Response module is enabled in the Licence, the Send Acknowledgement is enabled on the System Settings as well.  
The flag and the Acknowledgement text can be changed by Super User.
- Keywords removed from the Message Response page. Template ID added instead.

## 19 Version 1.3.1 - Maintenance Release – January 2011

- Keywords were hardcoded on the Master Template page. Now it is selecting from the SMS Provider settings.  
If there are no keywords in the active SMS Provider, button 'Insert' (keyword) is disabled.
- Whenever the full name is used, changed it to 'Surname, Forename' (Send Message page, Message Response page, Correspondence page)
- Do not count 'Defero' interface in the Licence
- Cannot delete a Department if there are contacts in the department
- Send Message page –Contacts (from Groups or Uploaded Files) are shown in the grid until the user submit message or change the tab or remove all contacts from the recipient list.

## 20 Version 1.3.0 - Minor Release – November 2010

The following section lists new features, enhancements to existing features and patches for version 1.3.0.

- New option to disable the web application timeout per user.
- New option to disable the password expiry option forcing users to change password.
- New option to view additional User Profile information
- New Option to include support for Windows Active Directory User Profiles which can be used to automatically login to Defero.
- New option to assign sending messages by Priority Queue per User
- New option to update Message Responses page automatically
- Include SubmitMessage Web Service Interfaces into licence model
- New alternative option to add another SMS provider (netsize)
- Browser compatibility- IE6-9, Firefox, Chrome, Safari; MAC- Firefox, Safari, Chrome
- Link 'Top of the Page' was added to pages that can have many records
- Removed 'View' or 'Select' fields from grid views, made ID (Mobile Number, Name) selectable in all grids
- Assign default button 'Enter' in searching panels (where filtering can be applied)
- Removed option to manually submit a MIF (Message Interface File) unless user is licensed for at least 1MIF
- New web form for capturing responses to text messages (for using on mobile devices)

## 21 Version 1.2.0 - Minor Release – June 2010

- Version New Notification Setup – Allows users to receive emails regarding responses received on specific days and at specific times
- New Licence Manager – can set-up a trial licence or a full licence. The licence controls the number of users, the maximum number of messages, the maximum number of Interfaces, and whether the Contacts and Responses are enabled.
- New Acknowledgement texts for message responses can be configured and enabled in the Licence Manager
- New Message Archive Deletion – Users can manually or automatically delete records from the Archives.
- New features to add in Response Keywords in the SMS Provider page
- Ability to add Response Keywords to a Template Footer
- New Message Response Archive
- New Search facilities for Responses and Message Statistics
- New screen to view Message Responses
- Ability to view full correspondence history for a particular mobile number and to send on the history by email
- Ability to Resend Messages that have a Receipt Status set to ‘Delivery Failure’
- Ability to Add a Note to a specific Response
- Ability to set the ‘Reviewed Status’ of a Response(s)

## 22 Version 1.1.0 - Minor Release - November 2009

The following section lists new features, enhancements to existing features and patches for version 1.2.0.

- New screen layout and menu style changes
- New Subdivision option for departments
- Queues and Services Management changed for administration users only
- Password now hidden in SMS Provider page and the Password has to be verified if it is changed or a new SMS Provider is configured
- Message Fields can be set up in the System Settings
- The Defero Website URL can be added in the Client Profile. This is used in emails sent regarding Responses
- Ability to add Message fields to a Template
- Ability to add additional Message Fields to a Message
- Ability to add Contact if a new number is entered through the Manual Entry Recipient method
- Message Transmission to Mobile Numbers in Ireland, and internationally if configured in the System Settings
- Mobile Phones numbers that have a Barred Status with can now receive Text Messages via Defero as Defero is deemed to be a ‘safe’ text messaging service
- Message Interface File Validation
- New Submit SMS message Web Service to allow integration of automated messaging in other applications or business processes.

- Can delete individual and multiple Contacts

## 23 Version 1.0.0 - Major Release – August 2009

The following section provides a high level overview of the major features supported in Defero.

Full details for each feature are available in the online help documentation.

### 23.1 Security

- Defero Web Portal including:
  - Defero Administrator Web Portal
  - Defero Client Web Portal
  - Super User Access
- Multi-User Web Access
- Secure login access through Defero usernames and passwords
- Account Expiry Check
- Password Expiry Check
- Login Failure Check

### 23.2 Display

- System Status Information
- Session User Name
- Date and Time
- Licensed User Name

### 23.3 Administration

- Department Configuration
- Interface Configuration
- User Profile Configuration
- System Event Log Archive

### 23.4 Advanced Settings

- Super Users Configuration
- SMS Provider Configuration
- Email Configuration
- System Settings Configuration
- Client Profile Configuration
- Queues Configuration
- Services Configuration

### 23.5 Message Templates

- Message Master Templates
- Message Templates
- Message Template Authorisation
- Read Only Templates

### 23.6 Message Processing

- Multiple message queues for processing large volumes of messages in real time.
- Message Queue Monitor for transmitting messages on the message queues.
- Message Interface Monitor for processing bulk message interface files submitted to Defero.
- Bulk Message Interface for submitting messages to Defero
- Recipient Interface File for sending messages to a list of recipients.
- Priority Message Queues
- Ability to delete Messages off Message Queues
- Queues & Services Manager for Starting, Suspending and Stopping queues & services.
- Block Recipients receiving messages by adding in their Mobile Phone Numbers

### 23.7 Creating Messages

- Short SMS Messages (160 characters or less)
- Ability to send Messages on a specific date and/or time
- Ability to set Messages to expire on a specific date and/or time.
- Ability to send Messages immediately on the Priority Queue
- Ability to add an Appointment Date and Time to a Message
- Ability to add different Appointment Dates and Times to a list of Messages
- Can create List of Contacts from Recipient Interface File, manual entry or by selecting Contacts from Contact Groups
- Messages are grouped by a Batch Reference name, which can be used later to trace the Messages on the Queues or in the Archives

### 23.8 Message Archive and Reporting

- Message Sent Archive
- Message Receipt Archive
- System Event Log Archive
- Search facilities for Messages, Receipts, Events
- Archive searches can be filtered by Dates, Mobile Number, Batch Reference, Interface ID, Template ID, Delivery Status and Receipt Status
- Excel Function to transfer data from Archives to Excel Datasheet
- Message Summary Report – includes detailed information about the Message sent including Customer References and Comments
- Ability to print Message Summary Report
- Message Statistics – Summary of all Messages and by Batch Reference

### 23.9 Data Validation

- Mobile Number Validation
- Recipient Interface File Validation
- Contacts Interface File Validation
- Required Fields



## 23.10 Contacts Module

- Ability to add Contacts – From Defero Users, from User Created Contacts and from uploading Contacts from the Contacts Interface File
- Can create Contact Groups with Private, Public and Custom Access
- Ability to add Contacts to Contact Groups
- Can View and Select Contact Groups and Contacts when submitting Messages
- Ability to search Contacts by Forename, Surname, Department, Subdivision and Mobile Number
- Ability to search Defero Users by Forename, Surname, Department and Subdivision
- Can give specific Users access to particular Custom Contact Groups
- Ability to view who has access to the Contact Groups

## 23.11 Documentation

- On-Line Help & User Guide
  - Administration Help Document
  - Client Help Document
- Documentation including: -
  - Release notes (this document)
  - Supported technologies & platforms
  - Message Interface File Specification
  - Message Recipient File Specification
  - Contacts Interface File Specification
  - Contacts Functional Specification
  - Technical Support Guide
  - Request Message Template Web Service Specification.
  - Message Processing Overview
  - HTTP Submit Message Receipt API Specification.
- Browser Support – Internet Explorer version 7 or higher.

## 23.12 Web Services

- Request Message Template Web Service