



SoftPro Select 4.2

Release Notes | November 4, 2016

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Table of Contents

Summary.....	4
Select Automation.....	5
Application Insights	6
About.....	6
Installation.....	6
My Work Items.....	10
Access	10
Layout Changes	10
Workflow Order Manager	10
Work Lists	11
Filter.....	11
Accessing	11
Toolbar.....	12
My Orders.....	13
My Tasks.....	13
Toolbar.....	13
Role.....	14
Toolbar.....	14
Miscellaneous.....	14

Summary

This release includes three major changes:

- **Select Automation:** Functionality has been added which provides organizations with the tools to execute certain processes with no action required from the end user. Administrative users will have the ability to create automated actions for their processes to help improve quality, consistency, and productivity, while reducing risks
- **My Work Items:** The My Orders panel has been renamed to My Work Items and now gives a view into Work Lists.
- **Microsoft Application Insights:** SoftPro will now be using Microsoft's Application Insights to help monitor application performance, assist in diagnostic processes, & improve the application.

Select Automation

Automation provides organizations with the tools to execute certain processes, with no action required from the end user. Administrative users will have the ability to create automated actions for their processes to help improve quality, consistency, and productivity, while reducing risks. Automation processes use predetermined [triggers](#) and [conditions](#) to automate [actions](#) and will occur without any intervention by the user. Processes can be configured to handle a multitude of different activities, but **two common scenarios** would include:

- Apply templates automatically.
- Update or add tasks automatically.

The key areas of the application that are changing with this new functionality are in SPAdmin:

- An Automation folder has been added. It contains:
 - A new process manager.
 - A new monitoring manager.
- Several new permissions have been added.

Please refer to the **Select Automation User Guide** for detailed discussion and examples.

Application Insights

SoftPro will now be using Microsoft's Application Insights, a best-in-class software metrics service. Application Insights will be activated by default and will allow SoftPro to monitor & improve application performance, assist in diagnostic processes, develop updates, & create new support resources for users.

As part of its normal function, SoftPro Select will now periodically transmit diagnostic and technical information to SoftPro pertaining to your computer system, incidents, and usage of the application.

- The data will not include any non-public personal information.
- The data will not personally identify you or your customers.
- Transmission of your information to SoftPro is voluntary; if you wish to opt out of this function at any time, please contact support@softprocorp.com.

About

All data sent to SoftPro is **anonymous**; it is relayed to SoftPro with respect to a customer license number. The following data may be sent to SoftPro:

- Select version number.
- Event performance: order save time, ledger save time, etc.
- Error details.
- Usage metrics: number of order saves, searches, etc.
- Work queue length: report queue, notification queue, etc.

Installation

New 4.2 installations or server upgrades (middle-tier server pool or standalone server) will include Application Insights. Note that for these changes to take effect, you must restart your middle-tier(s).

The following screen allows you to specify your settings. Click **Next** when you are ready.

1. The first screen defaults as follows; data will be sent to SoftPro:

SoftPro Select Server Creation Wizard

Application Insights

When enabled, this will transmit diagnostic and performance information to SoftPro to facilitate the support and enhancement of the application. Should you wish to prevent the transmission of this non-personal data, please select 'Disable Application Insights.'

☐ Disable Application Insights

☒ Enable Application Insights

Custom Instrumentation Key:
4bed6907-345f-475d-9394-982af2e01739

☒ Send to SoftPro

[More information](#)

Next > Cancel

- **Enable Application Insights** is enabled.
- **SoftPro's Application Insights key** is input here.

2. You may **Disable Application Insights** if you wish; you may turn it on or make changes later:

SoftPro Select Server Creation Wizard

Application Insights

When enabled, this will transmit diagnostic and performance information to SoftPro to facilitate the support and enhancement of the application. Should you wish to prevent the transmission of this non-personal data, please select 'Disable Application Insights.'

☒ Disable Application Insights

☐ Enable Application Insights

Custom Instrumentation Key:
4bed6907-345f-475d-9394-982af2e01739

☒ Send to SoftPro

[More information](#)

Next > Cancel

3. You may opt to use your own Application Insights account and send data to yourself. No data will be sent to Softpro. **Uncheck Send to SoftPro** and input your own **Instrumentation Key**:

SoftPro Select Server Creation Wizard

Application Insights

When enabled, this will transmit diagnostic and performance information to SoftPro to facilitate the support and enhancement of the application. Should you wish to prevent the transmission of this non-personal data, please select 'Disable Application Insights.'

☐ Disable Application Insights

☒ Enable Application Insights

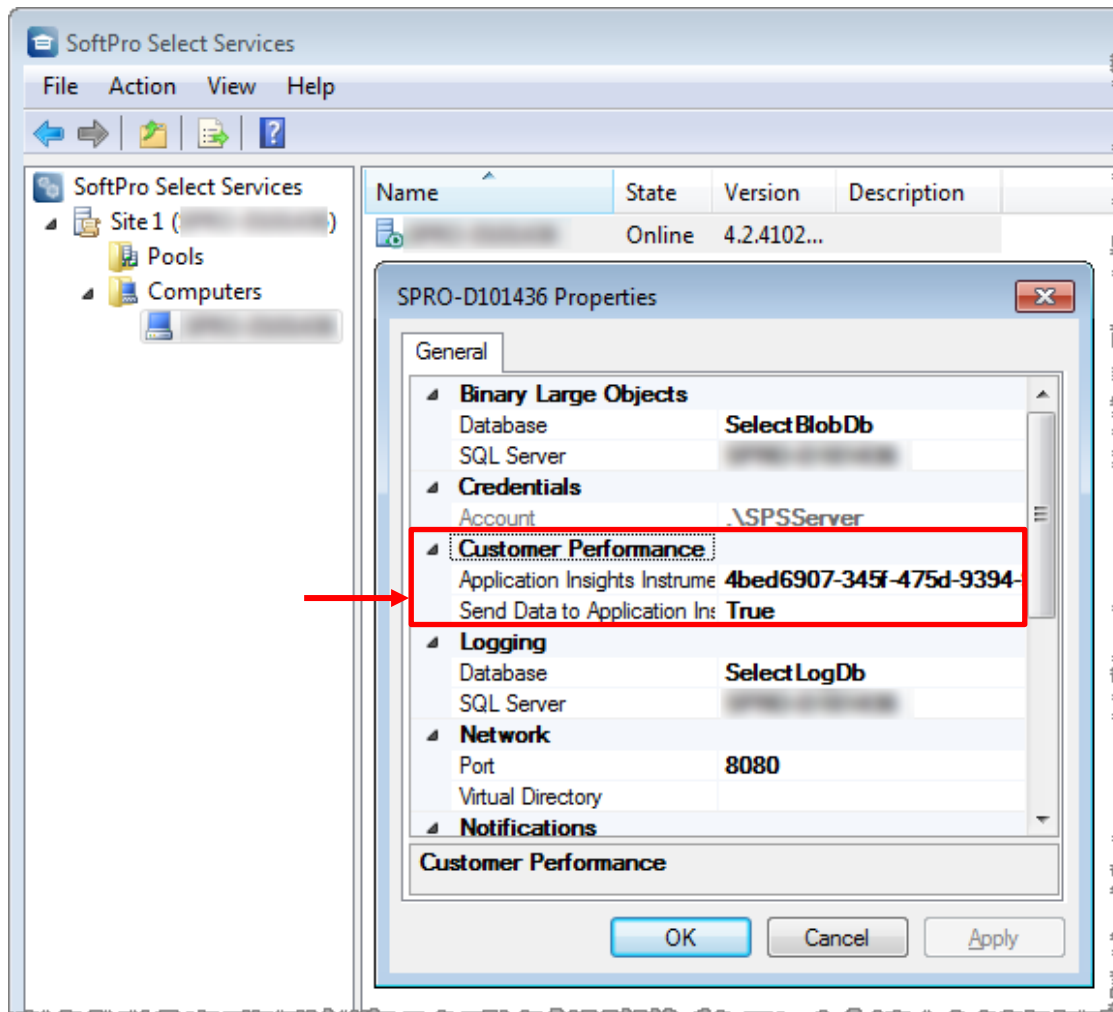
Custom Instrumentation Key:

☐ Send to SoftPro

[More information](#)

Next > Cancel

4. If you wish to make changes to your Application Insights configuration, you may access via **SoftPro Select Services**:



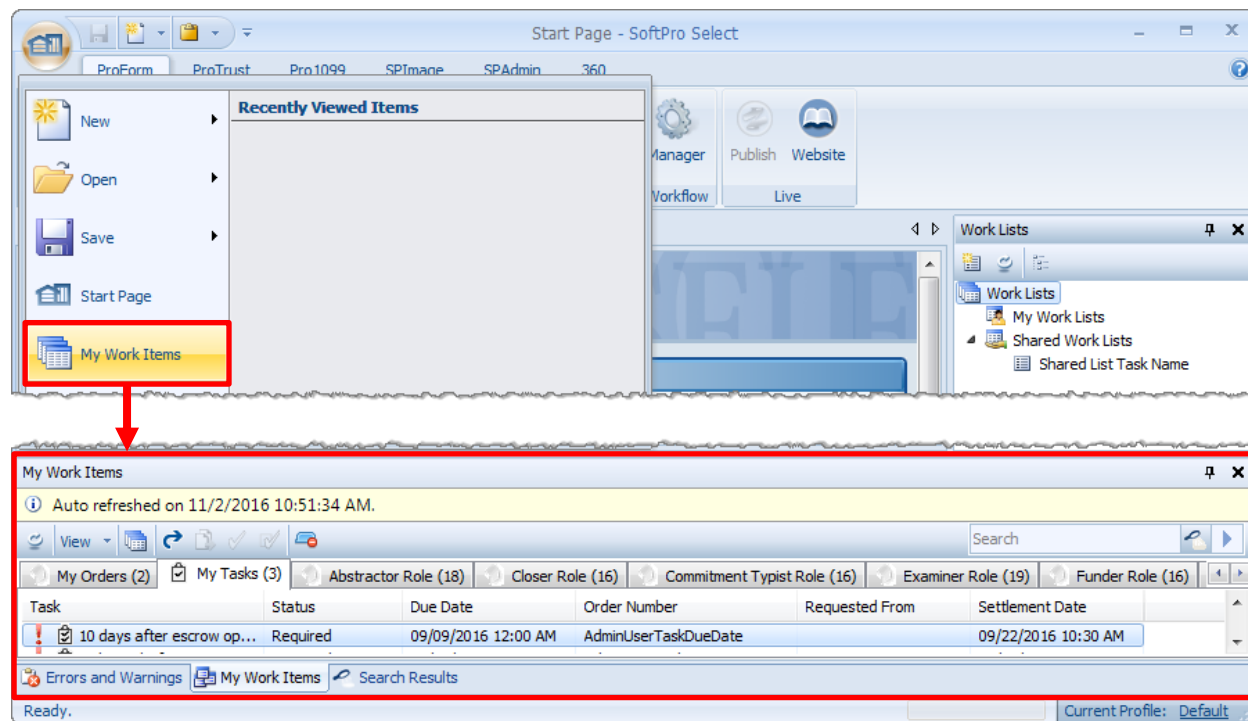
- If you do not see your machine under the **SoftPro Select Services** item in the pane at left, you may need to right click and select a computer to manage.
- After drilling down and selecting a computer in the pane at left, double click the server in the pane at right to view the configuration options.

My Work Items

The **My Orders** panel at the bottom of the screen has been renamed to **My Work Items**. This panel now gives a view into [Work Lists](#).

Access

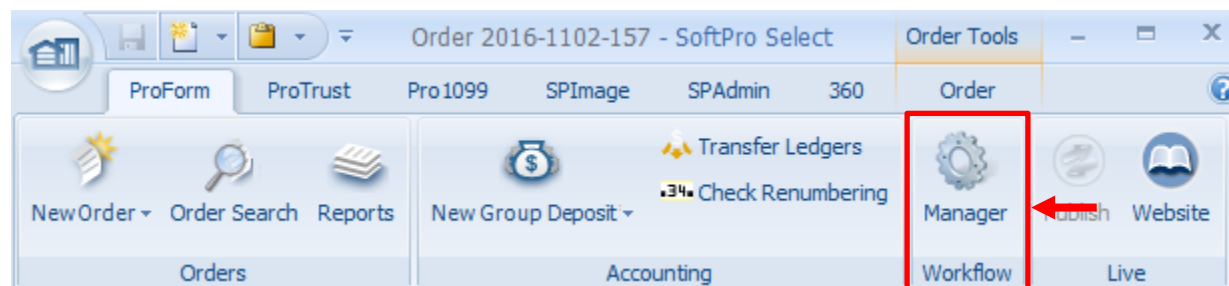
Access **My Work Items** in the panel at the bottom of the screen. You can reopen it through the main menu:



Layout Changes

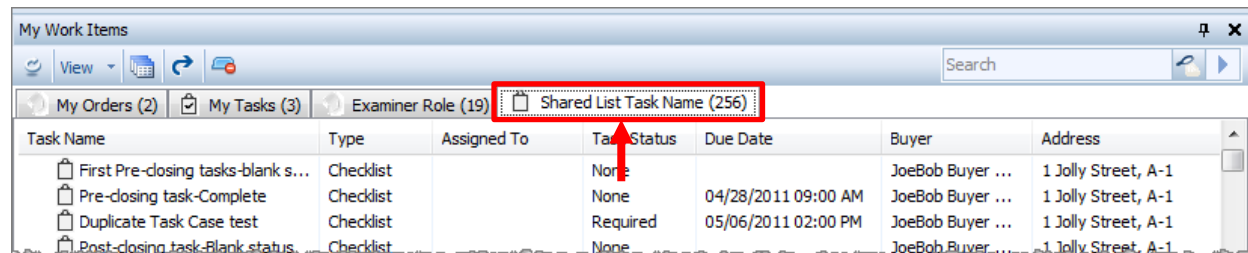
Workflow Order Manager

This is now only accessible from the ribbon at the top of the screen under the **ProForm** tab:



Work Lists

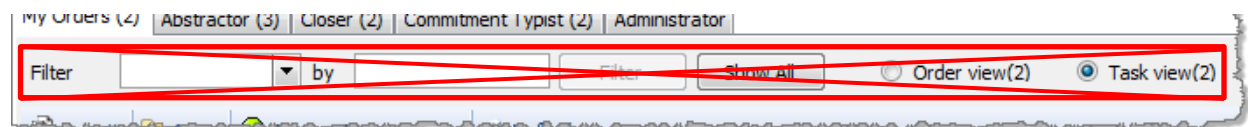
Work Lists results are now available in the same panel with **My Orders** and **My Tasks**.



Task Name	Type	Assigned To	Task Status	Due Date	Buyer	Address
First Pre-closing tasks-blank s...	Checklist		None		JoeBob Buyer ...	1 Jolly Street, A-1
Pre-closing task-Complete	Checklist		None	04/28/2011 09:00 AM	JoeBob Buyer ...	1 Jolly Street, A-1
Duplicate Task Case test	Checklist		Required	05/06/2011 02:00 PM	JoeBob Buyer ...	1 Jolly Street, A-1
Post-closing task-Blank status	Checklist		None		JoeBob Buyer ...	1 Jolly Street, A-1

Filter

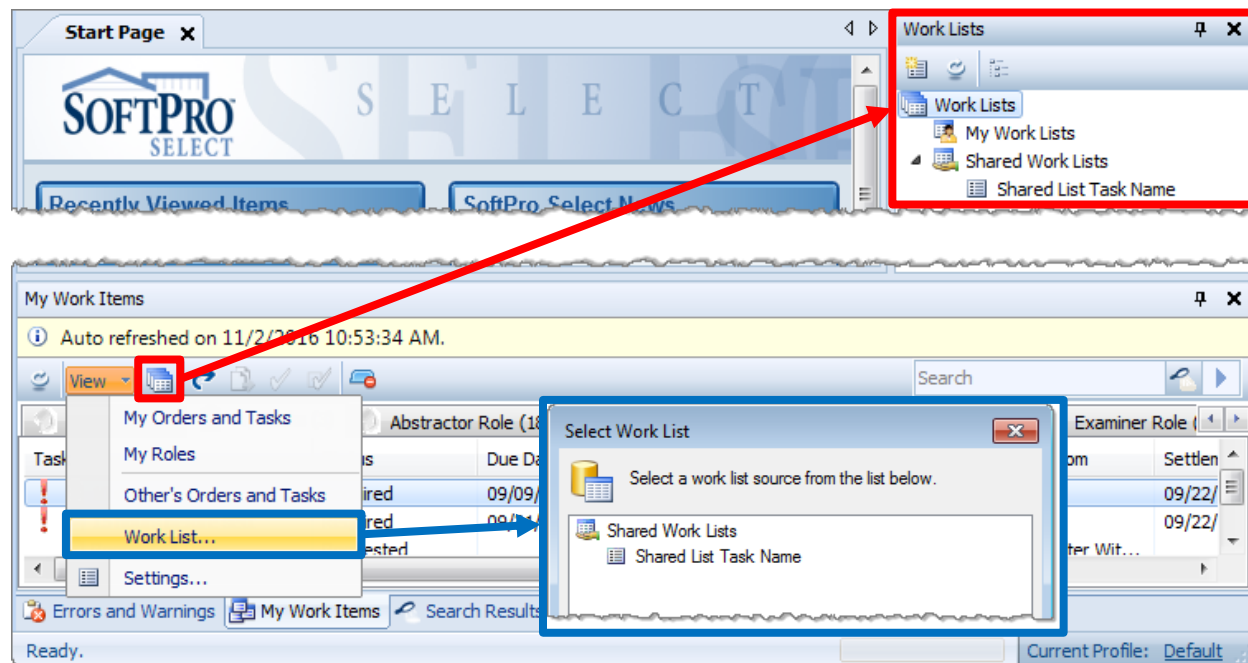
The **Filter** was removed from my work items; the Filter Queue permission was also removed from SPAdmin:



Accessing





You have two ways to access **Work Lists**:

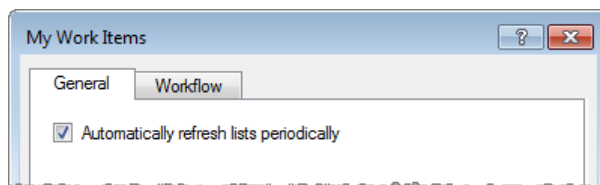
1. You will still **create** Work Lists in the **original location**.
2. You can **view** Work Lists results in this **new panel** OR the **original location**.



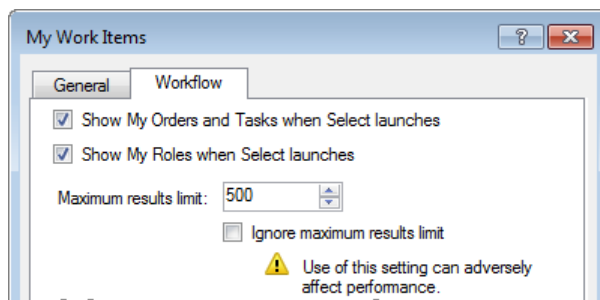
Toolbar

Use the buttons at the top of the panel to change what you see and complete various actions. You may also right click on an item to access most of these options:

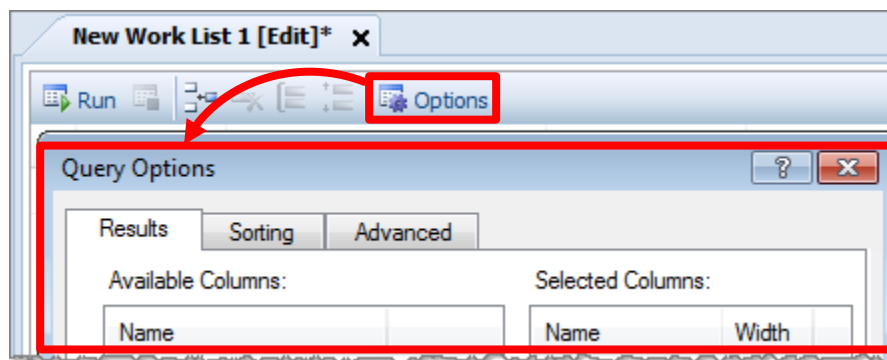
- **Close:**  This button will close the tab you are currently viewing.
- **Open/Submit:**  Open or submit the item currently selected in the list.
- **Work Lists:**  Open the **Work Lists panel** where you may create/view/manage your work lists. This does NOT open the Work Lists tab.
- **View:**  This allows access to a menu containing several options:
 - **My Orders and Tasks:** Opens **two separate tabs** for orders and tasks.
 - **My Roles:** Opens a **separate tab for EVERY role** that you are assigned.
 - **Other's Orders and Tasks:** Opens a dialog, that allows you to select other users and then open and view their orders and tasks in separate tabs.
 - **Work List:** Opens the new Work Lists tab.
 - **Settings:**
 - **General Tab:** By default, Work Items will refresh every 2 minutes. You may turn this off with the checkbox here and use the [refresh button](#) instead:



- **Workflow Tab:** Use this tab to set your Workflow defaults. You can specify whether or not My Orders, Tasks, or Roles are displayed when the application launches.



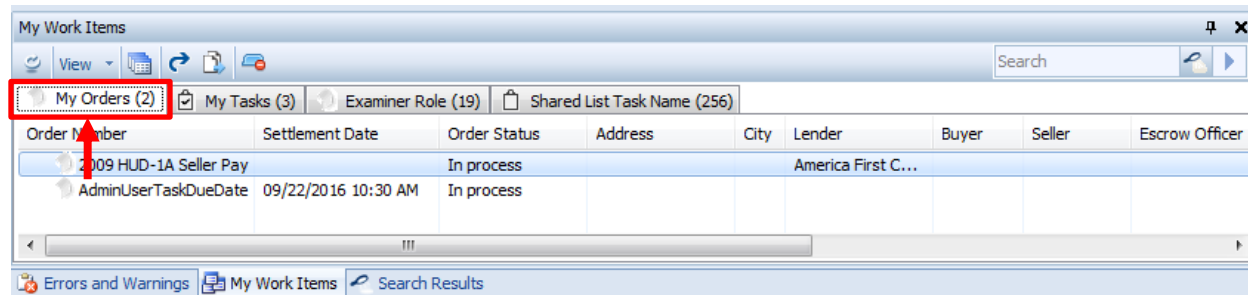
- You may specify the number of results you receive, or use the checkbox to return all results.
- **Remember:** Work List settings are located under the **Options** when creating Work Lists:



- **Refresh:**  Refreshes the list of items.

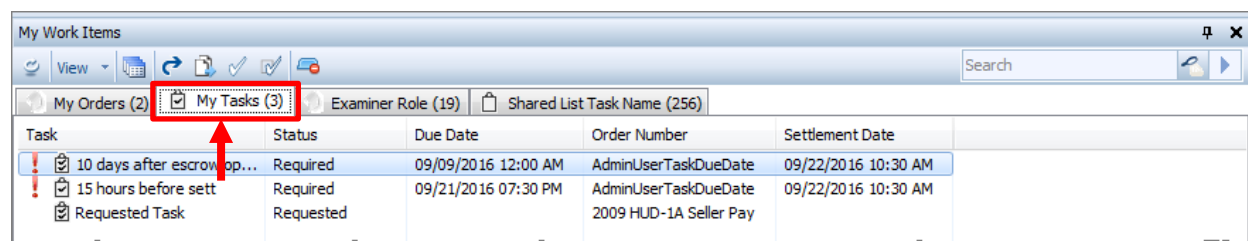
My Orders

Any orders assigned to you are shown in this tab; they are now separated from your tasks and are visible by default. The toolbar buttons are [explained above](#). My Orders are visible by default.





My Tasks

Any tasks assigned to you are shown in this tab; My Tasks are visible by default:



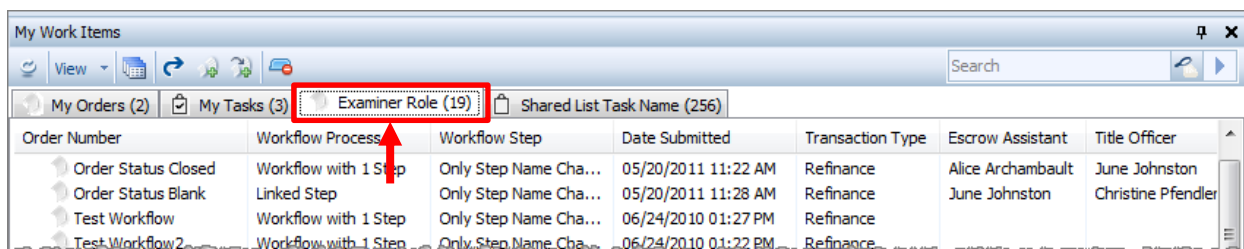
Toolbar

There are two buttons that are unique to this panel. These used to be **Change Task Status**:

- **Mark Completed/Received:**  Use this to mark a selected task as completed/received.
- **Mark Requested:**  Use this to mark a selected task as requested.
- The rest of the buttons visible here are [explained above](#).

Role

User **Roles & Other's Orders and Tasks** need to be selected from the [view menu](#) in order to see them:



Toolbar

There are two buttons that are unique to this panel:

- **Add :** Open or submit the item currently selected in the list.
- **Submit:** Open or submit the item currently selected in the list.
- The rest of the buttons visible here are [explained above](#).

Miscellaneous

The **Order Created** & **Task Created** parameters are now visible on the **TaskDueDate** formula in the formula editor **if** the user is on a checklist or requested task. **Note:** The editor is accessible via F8.

