Organizer Release History

Overview [1] | Screenshots [2] | Download [3] | Documentation [4] | Release History | Purchase [5]

Latest Release

2012-10-29 | v3.6.1003 [3]

FEATURES

- Added a tool that will synchronize the Organizer's project list with Outlook Master Category List (MCL). The tool can be found in Project Explorer's Tool menu.
- Added OneNote integration. Organizer can now automatically synchronize tasks with OneNote notes to Outlook tasks. See this [blog article] [6] for more information.

BUGS

- Fixed duplicate projects selected in the 'All Projects' dialog, when only one would return.
- Fixed empty task pane due to width dimension being forgotten.

2012-06-25 | v3.6.1001

FEATURES

- Added Inbox automatic cleaning, set rules to automatically remove emails assigned to a project and those marked as read.
- LinkedIn and Twitter, Organizer can now send updates to LinkedIn and Twitter, so you can communicate updates to your social networks. See the new Getting Started Guide for more information.
- Added Mileage Tracking, use Outlook's appointments to track travel distance to and from appointments. Embedded a mileage calculator to find the distance between two addresses. Added distance traveled pie chart to task pane and updated Timecard function to export travel distance for each time record (appointment).
- Configurable Auto Update Checking, Organizer will check for new updates at startup (which can be turned off) and manually via Project Explorer. Always know if there is an update ready to downloaded.
- Updated Getting Started Guide and provided a button on the Explorer ribbon. Additional context specific help has been added in some places.

BUGS

- Version mismatch dialog can be shut off.
- Added more performance counters for better performance improvements.

Previous Releases (oldest to newest - scroll down to get complete history)

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2009-02-07 | Published alpha version v3.0.1001.16

2009-07-10 | v3.0.1002

Fixed International date bug

2009-09-07 | v3.0.1003

FEATURES

- Added programmable timecard interval allowing the user to select the resolution of time tracking
- Added a 'Record Time' button to the Journal object so the user can benefit from the Timer control on the Journal item then insert a time tracking appointment on the calendar.
- Enabled the Timecard 'Export' button to output time tracking data so that it is easily pivotable in Excel.
- Changed Installation / Deployment model to facilitate auto-updates
- Included indexing capability to increase performance on slow back-end servers
- Included a timer in Outlook's Task object to facilitate time tracking for task execution
- Enhanced the Planning tab on the Task object to include Start Date, End Date, Estimated and Actual time, and completion percentage.
- Enhanced menuing on Project Explorer to simplify adding/editing projects and focuses.
- Enhanced the Duplicate Finder tool for a more streamlined and capable experience.

BUGS

- Fixed Organizer Task Pane Error
- Implemented self-healing for multiple POS Stores, which result from server caching synchronization issues
- Fixed Send + Follow feature, fixed intermittent misses on encapsulating outgoing message

2009-11-02 | v3.0.1004

FEATURES

- Added ability to associate an Operating System (OS) folder with a project - all files in a Windows folder show up in Project Explorer project tree. Added a right click context menu to do basic file manipulations.
- Added ability to associate an Outlook folder with a project - create or add a folder via project properties, then drag item into associated folder for it to be included in the Project Explorer.
- Completed Save To Folder on ribbon menu - saves an item out of Outlook into an associated Windows folder. Good for large sized messages to remove them from a limited sized server folder.
- Added Save to OS Folder on right-click menu to quickly move items into an associated Windows folder.
- Added ability to change 'To Task' behavior on the fly - can change from Embed Object to Text and Attachment and visa versa dynamically.

BUGS

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- Fixed timecard international date issue - works for non-US culture date formats now
- Fixed Project Explorer date sorting bug

2010-01-02 | v3.0.1006

FEATURES

- Improved performance and response times, especially transition between inbox and calendar views, and project explorer start up response time
- Added Organizer buttons to Post and RSS objects
- Added Project Search capability within Project Explorer
- Added two new charts, 1) Project Risk Pareto, and 2) Project Overdue Pareto to Custom Task Pane
- Added more metrics and statistics, including project risk score, task completion confidence and capacity, and several new 'counts'
- Enhanced Project Explorer context menus

BUGS

- Fixed indexing to include Notes & Sent Mail
- Fixed 'OR' message box error
- Fixed GAL (Global Address List) error to support non-exchange like GALs
- Fixed Orphaned item error

2010-05-07 | v3.1.1000

FEATURES

- Added task delegation tracking - using a request philosophy (versus assignment), track what you expect others to do using the 'Task Request' button on messages, the new Planning tab on a Contact item, and the People filter in the custom task pane.
- Cleaned up the Task Pane to better utilize screen real estate.
- Added new Message Notify button in the Task Pane to help reduce distractions but stay connected
- Added Online Help to the Project Explorer menus.
- Added the new Mini-Task, to support starting tasks right from the Task Pane or Outlook ToDo bar
- Now have the ability to print or export data in any Project Explorer view. And print out your project list or project details using the Reports menu in the Project Explorer.
- Added datastore auto-backup and restore capability for those times when Outlook or a mobile device sync corrupts your project database.
- Added the ability to convert sent mail items that have the follow up flag set into actual task objects. Allows better project tracking and ability to assign a focus to a follow up item.
- Cleaned up and standardized the right-click context menus, and extended them into Outlook views in addition to Organizer views.
- Added registration capability that provides a generous but limited trial.

BUGS

- Fixed POS Store reminder bug
- Added auto-backup to fix synchronization issues with mobile devices that truncate appointments
- Fixed Combine-Title bug in the Project Properties method

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2010-06-27 | v3.1.1001

FEATURES

- Added the ability to Project Manage using a Mindmap. Use the 'Window' menu in the Project Explorer.
    - Adds a graphical representation of the project.
    - Right click to "Center on Me" for any shape. Enables the ability to focus in on projects, tasks trees, appointments, journal items, e-mails, etc. Center on a person and view the tasks for which they are accountable.
    - Move tasks around using drag and drop - expedites the ability to create task / sub-task trees.
    - Drag to Act has been added, e.g. drag a task to a person and delegate or send an action request, drag a task to the "E-Mail" shape and send an action request if the task is delegated, or create an e-mail with the task embedded, drag a task to the "Appointments" shape and create an appointment with the task embedded.
    - Quickly see overdue tasks in the task tree, delegated tasks, or completed tasks.
    - See what projects are affected by overdue tasks by using the Focuses tree.
    - Zoom in and out, expand or compress quickly with keyboard shortcuts or use the menus. Move the map around by dragging the root node.
    - Hover over an object and see more details in the tooltip.
    - Export your Outlook mind map to FreeMind, a free mind mapping tool.
- Added Defer to an Outlook Project Folder - when defering an e-mail to a task, you can automatically move the mail into the related Outlook folder.
- Added ability to export and import work break down structures. Supports saving tasks and jounal items so project templates can be created and reused or shared with others.
- Added more "Special" focuses to the Project Explorer tree.
- Updated Registration process.

BUGS

- Fixed Delegate button in the mail read ribbon.
- Fixed Task / Sub-Task issues for Exchange users.
- Fixed Project assignment in task pane right click context menu

2010-09-19 | v3.1.1002

FEATURES

- Added "Schedule Time" to e-mail processing via the right-click context menu and the e-mail ribbon. You can now schedule time for an e-mail right on your calendar the same way you create a task. It will ask for a project and copy over the e-mail into an appointment. - Thanks RobW
- Added 'save state' to the Project Explorer. Whatever settings that were used in the last Project Explorer session will now persist. For example, if the mindmap was in use when the Explorer was exited, it will now re-appear upon restart.
- Added the ability to change the tool's settings directly from Outlook's Tools - Options menu.
- Added support for ToodleDo [7] service.
    - Synchronize your tasks with ToodleDo - supports two-way sync. Any task added or changed in Outlook will automatically be updated within ToodleDo. Any task added or changed via the ToodleDo website or any supported application, such as the iPhone application, Firefox addon, Twitter, Google Gadgets, Jott etc. will automatically

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added/updated within Outlook.
- Synchronize your Projects and Focuses with ToodleDo's Folders and Contexts. Any changes made to a tasks' context or folder on the ToodleDo service will move the task to a different Project or change the assigned Focus in Outlook.
- Multiple ToodleDo accounts are supported. Each Outlook profile on a computer can connect to a specific ToodleDo account.
- Multiple computers can be sync'd to a single ToodleDo account. Enabling the transport of tasks from one computer to the next.
- Works with all ToodleDo's account types, such as free and Pro.
- If on ToodleDo's Pro account - tasks / sub-tasks are not yet supported via sync. [Contact] [8] us if that is important to support.
- ToodleDo does not yet support 'Collaboration' via their API, if sharing and assigning tasks amongst a project team from Outlook is important, let [ToodleDo] [7] know and perhaps they will get it into their API more quickly.

BUGS

- Fixed 'blank project in Project Explorer' - thanks SWelsh
- Fixed duplicate focuses in Categories field
- Fixed timing updates not occurring in Scheduler
- Fixed 'Delete All Duplicates' in duplicate contact finder tool
- Fixed 'Moved to Master Tasks' when Start Date was not set to none

2010-10-30 | v3.1.1003 Patch (v3.1.1003.12)

BUGS

- Fixed auto task assign when sending notifications inadvertently
- Fixed ToodleDo reminder sync
- Fixed "My Record" not saving on some International installs
- Fixed ToodleDo key persistence when changing ToodleDo accounts

2010-10-10 | v3.1.1003

FEATURES

- Added ability to include 'All Task Folders'. The previous version of the add-in would include any task in the Outlook default task folder. There is a new Options item that enables the user to include any folder in the profile whose default item is a task. This is useful if folks have multiple task folders and/or they are subscribed to a 'server folder' such as a SharePoint task list.
- Added Proxy support to the ToodleDo [7] support service. This can be especially useful for folks who have special proxy setting needs beyond what are the default settings captured in Internet Explorer.
- Enhanced tool tips in the Project Explorer list and mind map views.
- Changed right-click context menu when processing e-mails to make it more consistent with the 5D method and a bit more intuitive. When you 'Defer' an e-mail, you now Defer "To Task" or "To Calendar", creating a task or appointment respectively.

BUGS

- Tightened timestamps in the ToodleDo sync service. If synchronizing took more than a few

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seconds, it was possible to add or delete an item during a synchronization cycle that would then be missed in the next synchronization cycle. With this fix, the probability of that occuring is much lower.

2010-11-16 | v3.1.1004

FEATURES

- Updated auto-filing rules to better support Zero Inbox practices. All 5D events support automatically moving the processed e-mail message to a destination folder or associated Outlook project folder.
- Added Save Attachments tool to right-click context menu and ribbon while processing e-mail. Supports saving all attachments within an e-mail to an associated Windows folder for the selected project.
- Added ability to include a 256 character teaser when using the 'Embed' options in connecting objects. For example, when an e-mail is deferred to a task and the embed option is used, the originating e-mail is embedded as an object in the generated task. The first 256 characters from the e-mail are also added to the task for quick reference.

BUGS

- Enhanced responsiveness when switching between mail and calendar views. Organizer task pane's list view now refreshes in the background.
- Fixed ToodleDo / international separator character mismatch in ToodleDo tags. (thanks Daniel)
- Fixed Delegate action so e-mails with embedded graphics get passed along intact.
- Fixed Delegated task embed object returning an empty e-mail.

2010-11-21 | v3.1.1005

BUGS

- Added Registration troubleshooting to help installations behind corporate proxies and firewalls.
- Fixed Project Properties dead-end when clicking on a Project in the List View in Project Explorer.
- Fixed ToodleDo passwords not being passed when they have special characters, such as a pound sign ("#").

2011-01-05 | v3.1.1008

FEATURES

- Added ability to control the automatic appearance of the Organizer pane.
- Added save state to Organizer Pane, now saves the pane width and remembers between Outlook sessions.

BUGS

- Fixed double click error in Project Explorer, sub-tasks not opening upon double-click
- Fixed ToodleDo credentials not saving in some international installations
- Fixed slow response due to Exchange folder timeouts when using 'Include All Task Folders' feature

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- Fixed inability to include reserved characters in Project or Focus names when synchronizing with ToodleDo, e.g. the ampersand (&).
- Fixed sync'ing deleted projects with ToodleDo

2011-02-13 | v3.5.1001

FEATURES

- This version is compatible with Outlook 2010 32 and 64 bit on Windows 32 and 64 bit versions up through Windows 7. Adds navigation buttons into the 2010 explorer ribbon.
- Added Filing options for processing e-mail to the right-click context menu and the mail read ribbon. You can now file an email directly to an Outlook folder, journal item, or Windows folder. You can also file a conversation in one-click.
- Added ability to enable auto-creation of an associated Outlook folder when a new project is created.
- Added error checking for common ToodleDo connection mistakes such as sync'ing more than 1000 tasks or mis-setting the configuration settings.
- Updated the [Getting Started Guide] [9] to include documentation for updated features including ToodleDo and a number of Options enhancements.

BUGS

- Moved the data store to avoid calendar collisions corrupting the data store.
- Fixed Exchange user in delegated e-mail not being found in the user's contact list, thanks Brad L.
- Fixed Outlook 2010 embedded object issue with workaround method.
- Fixed Backup / Restore issue. Backups were not showing up if profile name included a dot character.
- Fixed delegate task not including originating task information.
- Fixed error message alerting the user when a license was not yet issued.
- Fixed file icons not showing up in Project Explorer if a folder path was in a UNC form.
- Fixed various UI defects.

2011-04-02 | v3.5.1004

FEATURES

- Added workspaces to Project Explorer - when enabled via Tools - Options, this feature introduces a mechanism for grouping projects. For example a workspace could represent a community you support, i.e. Personal, Professional, Non-Profit, etc. Each project can belong to one workspace, which can be set by changing the workspace's properties, and/or changing the project's properties.
- Added the ability to process multiple items into the drawer by selecting multiple items and using the right-click context menu in a mail folder.
- When saving a work breakdown structure (WBS), you can now set the import date to be relative to the project's start date (the first 'start date' in a task in the WBS) or end date (the last 'due date' in a task in the WBS). This can be quite useful if you're doing work that often follows a pattern.
- Added the ability to open the Project or Windows Explorer from the ribbon menu within an Outlook object. For example, if you're editing a task assigned to a project, the ribbon menu can

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be used to start Project Explorer focused on the task's project.

BUGS

- Fixed the timecard that missed counting time from broken (appointments that were different than the series they belonged to) recurring appointments.
- Changed Journal item Project Explorer's list view date from creation date to start date.
- Fixed registration information not sticking.
- Included the Getting Started Guide in the download to make it easier for people to get help at their desktop.
- Fixed missed special characters in ToodleDo username when creating a connection with the ToodleDo service.
- Fixed mapping ToodleDo's task 'length' to Outlook's Total Work (Ceptara's Estimated Work) in the synchronization method.
- Fixed / Added including 'Sent Items' in the File Conversation Drawer feature.

2011-06-22 | v3.5.1006

FEATURES

- Added a description field to Project properties. The new field is reported in the Project's detail report.

BUGS

- Changed project delete from inactivating the project to removing the project from the data store.
- Fixed the Office App Ghost mail. Using a program other than Outlook to create and send a message left the composed mail message window open after the Send key was pressed. The composed mail message window is now closed upon sending.
- Fixed the Timecard Interval not saving in the Options dialog.

2011-06-04 | v3.5.1005

FEATURES

- Added a periodic digest. The tool can automatically publish a digest to the user and/or any subscriber daily, weekly or monthly. The digest includes information about upcoming tasks and appointments and a summary of the last period's activity, i.e. # of e-mails sent, appointments attended, tasks completed and contacts updated. Useful for communicating details of what is occupying your time that can be sent to your team, supervisor or family member.
- Added the ability to import and export the data store (File - Manage Data Store in Project Explorer). Useful when moving Organizer to a new computer.
- Added additional project statistics to project detail report.
- Added About button to Options dialog.

BUGS

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- Fixed a bug in automatically showing the task pane when 'Calendar' is written in a language other than English.
- Fixed the inability to delete a project in some circumstances.
- Fixed / added the ability to double click on a project name when processing an e-mail - saves a click.
- Fixed not assigning selected project immediately to mail message when moving message automatically to an associated project folder.

2011-09-12 | v3.5.1007

FEATURES

- Added ability to assign a project to an outgoing e-mail.
- Added option to weekly digest to select the day when it gets published.

BUGS

- Clarified registration dialog to facilitate more intuitive registration process.
- Fixed registration failures due to International characters in the user's web profile.
- Fixed ToodleDo reminders not synchronizing properly.
- Fixed Digest not saving options when already turned on.
- Fixed Export WBS function so missing 'My Record' doesn't harm the export. Also fixed the WBS relative date not setting to tasks' first or last due date.
- Added better direction to a number of user error conditions, e.g. GAL failure.

2012-01-07 | v3.5.1010

FEATURE

- Added ability to set the auto project numbering start value.

BUGS

- Fixed device identification issue.
- Updated software quality metrics tracking service.
- Added more tracing code for better customer support.
- Fixed an issue with potential data overflow for identifying the 'master' device.

2011-12-19 | v3.5.1008

FEATURES

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- Added Welcome screen with Video training that launches at first start up.

BUGS

- Fixed flagged non-mail items stopping auto-processing of Sent Items and Inbox folders for creating tasks automatically.
- Fixed the use of "<>=" in project name, could result in tasks not being found.
- Added more error reporting statistics to aid in support calls, e.g. bitness of the Outlook and the operating system.
- Fixed potential duplicate tasks being created via the auto-processing of the Sent Item and/or Inbox. If more than one computer is running the add-in and is on at the same time as other computers, duplicate tasks could be created due to multiple jobs running simultaneously.
- Updated accessibility keyboard shortcuts in Project Explorer.
- Fixed ToodleDo sync'ing when lost connection to Exchange. Could result in deleted tasks.

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