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### **FASTPORTAL**

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#### **Case: 25242 Create user/role assignment dynamic auto-load process**

Created a new administration form in each application under Administration -> Access -> Auto-load Roles. This allows technical/administrative users to provide a role and a SQL query that will return a set of users. When saving on this form, all users returned by the query at that moment will be immediately granted the role, then a nightly job will re-run the query each night to keep the list of granted users up to date.

Note: any users who have been manually granted the role will not be affected by the auto-load process. Users must exist in FASTPORTAL.vwAllUsers (i.e. be valid FAST users who can log in and receive roles) to be successfully auto-loaded.

Tip: the SQL query will be executed under the FASTPORTAL schema, so make sure any required grants, synonyms or database links are in place before saving.

#### **Case: 28991 Available Roles not sorted on Menu Access screen**

Updated the list of "Available Roles" on the Menu Access screen to always be sorted alphabetically by Role name.

#### **Case: 30153 Ability to include page notes when exporting a report to PDF**

Added the ability to include page notes on a PDF export. When editing page notes the following options can be selected:

- Do not print on PDF
- Header on the first page
- Header on all pages
- Footer on the last page
- Footer on all pages
- Header on the first page and footer on the last page

#### **Case: 30742 Ability to create Oracle tables**

Added the ability to create client specific tables in the FAST Oracle database. These tables would usually be used to create FAST data entry pages. Each application has a new option under the Queries menu named "Table Builder."

#### **Case: 30743 Re-organize Queries menu in each application**

In each application, the following menu items have been grouped together: Query Builder, Query Viewer, and Query Object Access.

These items have been consolidated under a Query Builder sub-menu below the Queries (or Reporting, depending on the application) top level menu. This logically groups the query functionality together and matches how the Table Builder and Page Builder items are grouped together.

#### **Case: 30767 Improve Excel import performance and user experience**

Improved Excel upload performance on new style data entry pages by about 5-10%.

Updated validation when required fields are missing: if the file contains less than 7500 cells (rows \* columns) the validation will run normally and a new file will be generated which will highlight all validation errors including the missing required fields (this is not a change in behavior). If the file contains more than 7500 cells and required fields are detected as missing, the process will now immediately abort without performing any additional validation (this change in behavior saves users with large imports from waiting 5-20 minutes only to find out their file was wrong).

### **Case: 30858 Calculate percentages for Virtual Column totals**

When creating a virtual column, if you format it as a percentage and select calculate total, the total will now be calculated based on the formula supplied. Previously the total was just a sum of that column, which was incorrect for percentages. For this to work, any/all fields used in the formula need to also display totals otherwise the correct percentage can't be calculated in the footer and the total will appear blank.

### **Case: 30870 Improve error reporting for Scheduled Reports when no recipients exist**

When creating a [group] Scheduled Report the "Email To:" dropdown will now exclude any groups that do not currently have any members.

When running Scheduled Reports, if a group is currently empty or if none of the members in the group have menu access to run the report, the Schedule will now be marked as "Skipped (no users in group)" or "Skipped (no users have access)" instead of "Failed (did not complete in time)."

### **Case: 30908 Pinned Report Notes**

Pinned Report Description is now displayed on a pinned report underneath the Pinned Report Name at the top of the reporting page. When a Pinned Report is exported to a PDF, the description will be printed on the first page.

### **Case: 30909 Alert Web Items Active Date control moves -1 every time an alert is edited and saved.**

Fixed bug that moved the Active and Start dates ahead in the Web Alert each time the alert is edited.

### **Case: 30945 New report for Report Scheduler: Empty Groups Audit**

Created a new audit report in each application under Administration -> Report Scheduler -> Empty Groups Audit. Ideally this report should never return any results, but if it does that means a report is scheduled where the group has no members or where all the members in the group are missing security access that would allow them to run the scheduled report.

### **Case: 30958 Filter trail is not displaying Virtual Columns when used as column level filters**

Filter trail displays Virtual Columns when column level filters are applied.