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## **FASTAR**

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### **Case: 30763 Payment import bug with written off invoices**

Fixed a bug with the payment Excel import process when validating invoices numbers. The validation was just making sure the invoice number existed, it wasn't checking if it was already paid or written off. Payments towards invoices that have a provision for bad debt set up will also not work with the Excel import process. These payments need to be manually entered so the provision can be reversed through the popup dialog when saving the payment.

### **Case: 31095 Ignore config setting 91 when 150 turned on**

When entering payments:

- Configuration setting #91 is: "Payment Type is required? (Y/N)"
- Configuration setting #150 is: "Create Payment JV when closing Deposit Number (Y/N)"

If configuration setting #150 is Y then setting #91 will be ignored and the payment type will always be required.

### **Case: 31097 Payment batch sequence number**

When the ability to create payment JVs to draw down the AR balance in the GL was added via case 24418 in version 4.3.04 a new sequence number was not created for the batch IDs. This means the payment documents eg. PY000123, would not start at PY000001 and increment by one each time. The system would use a generic shared sequence. This number would be different at each client site and since it's shared the payment batch IDs might increment by seemingly random amounts each time rather than +1 each time eg. you might get PY000123 today and PY000456 next time when you were expecting PY000124.

This case creates a new sequence number specifically for payment batch IDs that will ensure the number increments by +1 each time with no gaps.

For clients who are already using this functionality, when you are upgraded we will attempt to synchronize the new sequence number with the last generated PY number, unless you explicitly ask us not to.

For clients who are not yet using this functionality, the sequence will start at 1.

### **Case: 31107 Open up "Credit Against" field to allow Debit Memos to be created to clear over payments**

The "Credit Against" field on the Invoice page will now show invoices that have been over-paid.

In the past only partially paid invoices would show up allowing users to create Credit Notes which would automatically apply an adjustment to zero out the outstanding balance of the invoice specified in the Credit Against field.

Now if a Debit Memo needs to be created to adjust an over-paid invoice users can select the over-paid invoice in the Credit Against field and an adjustment will be made to remove the over payment.

When a Debit Memo (or Credit Note) is posted to the ERP system, the AR balance in the GL will be adjusted accordingly, but the process of issuing a refund cheque or writing off a small over payment amount will still need to be dealt with manually.

***FASTBUDGET***

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**Case: 30800 Reinstatement Development Excel Import page**

The Development Excel Import page has been updated to include the updated set of data columns.

The excel template for this Import is the same as the one used by the Budget Admin - Import wizard. It can be managed under Administration - Information - Excel Import Spec - budDevelopment.

**Case: 30882 Add Overview Video Tab to Budget Tutorial Videos**

Even if not subscribed to Budget Tutorial Videos, all FAST Budget users can view the new Overview videos which outline the new features and functions available in FAST 4.3.13 or higher.

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***FASTFINAID***

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**Case: 31025 Add dynamic function based filters to Aid Year**

New function based filters Current, Next and Previous have been added for the Aid Year filter.

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***FASTFINANCE***

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**Case: 30041 Add ability to select desired hierarchy level from drop down to supplement up/down arrows**

On the Summary by Hierarchy report, when summarizing by a hierarchy GL code, in the top left corner the hierarchy level would display with up and down arrows beside it allowing the user to change the summary level without changing their filters or drilling down on any particular code. This has been updated to be a dropdown list so that users can now directly select the level they want to summarize by. For example if you want to summarize by level five you no longer have to click the down arrow four times and wait for the report to run each time.

**Case: 30780 New dynamic filter: Last Period (excluding accrual period)**

Added a new dynamic fiscal period filter: "Current Fiscal Year / Last Period (excl. 14)"

The original "Current Fiscal Year / Last Period" filter would use period 14 when the current period is 1. This new filter will use period 12 when the current period is 1.

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## **FASTHR**

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### **Case: 20693 Add RANK to Faculty pages**

Added Effective Date Rank column and filter control to Faculty Leave and Contact Hours reports. Added Action Date Rank column and filter to Faculty Rank report. This new Ranking function allows the user to zero in and report on data based on when (within a group) a record was changed/created (i.e the effective date).

### **Case: 26609 Position Incumbent History - Date Rank**

New columns added; Effective Date and Date Rank. This is a good way to determine/group data based on effective date.

### **Case: 27161 Name & Email standardization on all reports**

Where applicable, there is now a standard group of columns for "Name" across all HR reports: NAME\_FIRST, NAME\_LAST, NAME\_LASTFIRST, NAME\_LEGAL, and NAME\_FIRSTPREF (first name preference). Also, an EMAIL\_ADDRESS column with hyperlink to the FAST Email Control has also been added to most HR reports.

Default column and filter controls (sort) order has been assessed, and, in many cases, reorganized. Standard naming conventions across all HR reports has been applied to many reports (for example, Employee ID is now the default name for the EXTERNAL\_ID field and filter control across \*all\* reports). Note that these changes \*may\* affect existing column and control sort order as well as pre-existing pinned reports, which may need to be updated to incorporate these changes (a simple 1-step "update" process - see online documentation for details).

### **Case: 30082 Add RANK to Benefit / Dedn Info page**

Added Effective Date Rank column and filter control to Benefit and Deduction Setup report. This Ranking function allows the user to zero in and report on data based on when (within a group of deduction codes) a record was changed/created (i.e the effective date).

### **Case: 31050 Add SALARY\_GROUP\_CODE to All Jobs, Current Jobs, Primary Jobs, and Current Jobs with Labour reports**

The Salary Group Code has been added as a column to the All Jobs, Current Jobs, Primary Jobs, and Current Jobs with Labour reports. This data comes from the Banner field NBRJOBS\_SGRP\_CODE. This data was previously only available in the Pay Grades report. This field is hidden by default.

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***FASTJV***

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**Case: 24643 Don't overwrite Bank, Reference and Deposit values when in Basic View**

When adding a new line to a JV (regardless of whether you do this from Basic View or Advanced View) if the Bank, Reference or Deposit fields are specified in the document header but not specified for the new line, these values will be defaulted for the new line. This is how the system has always worked.

In the past, whenever an existing line was saved from Basic View the default header values would be used. This means if someone edited the line in Advanced View and changed the Bank and/or Reference and/or Deposit values, or if the values in the header record were changed after the line was originally created, the edited line would be kept in sync with the default header values.

This was causing problems for some clients where one user might be editing a document in Advanced View and setting specific line-item level values for Bank, Reference or Deposit, then another user would edit the document in Basic View which would overwrite the specific values, and the user wouldn't even be aware that it happened.

To solve this problem, from now on the default header values are only ever applied to the line items when they are first created (and if created from Advanced View, only when the values are left blank).

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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.

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***FASTSTUDENT***

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**Case: 25313 Send notification email to instructor when grades are submitted by the Approver**

Send notification email to Instructor when grades are submitted by the Approver. This feature will only work from the CRN approval page, and only if Configuration Setting #565 in the FAST Student application is populated with an email address. This email address will be used as the FROM address when the approval notifications are sent out.

The message and subject for this email can be edited using the Application Messages screen located under the Site Administration -> Layout menu.

**Case: 30465 Add Major, Minor, and Program to All Registration Records report**

New filters have been added to the All Registrations report. The Level and Program filters are enabled by default. However, the Major and Minor filters are not. There are two filter options for both Minor and Major. If you want to filter by the Major or Minor assigned to the student's general record you should enable Major 1 & 2 and/or Minor 1 & 2 filter options. If you want to filter by the Major or Minors associated with the current curriculum information you should select the All Majors and/or All Minors filter options.

**Case: 30982 Update Subject filter to allow for search option on both code and title**

Allow the Subject filter to be set up as a search control, and when searching look for matches on both the code and title/description fields.

**Case: 31112 Schedule Desc, College Code and Desc have been added to Course Summary and Enrollment Summary reports**

College Code and College Desc columns have been added to the Course Summary, and Enrollment Summary page. Schedule Desc has been made available on both pages as well.

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***FASTWEBREQ***

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**Case: 20081 PO Change request submission**

We have added the ability for you to create a Web Requisition Type of PO Change Request Submission. By choosing this option from the drop-down list, a list of eligible Purchase Orders will display for you to select from. Choosing an existing PO will populate all the accounting lines and allow you to make modifications as needed before submitting through your regular approval queue processes. Making modifications here will not alter the data in your ERP, however it will allow more accurate record-keeping between FAST and your ERP when changes have been made. The Web Req status report will display these entries with a default Prefix of PCR for easy retrieval and sorting, and once approved and completed, will auto-populate the "Cancelled" field with the following notation: PO Change Request Completed.