FASTJV

Case: 31916   Check for concurrency issues before posting

Added checks for concurrency issues when posting:

- If an edit was made to a document by one user while another user is attempting to post, posting will be cancelled and an error message will be displayed to the posting user to review the changes before proceeding.

- If a user has the document open for editing while another user posts it, the changes made by the editing user will be discarded and a warning message will appear explaining the document was posted while they were editing. The document will then display in read-only mode.

Global Changes That Affect All Applications

Case: 30817   New and improved Dashboard functionality

Dashboarding in FAST has been completely rebuilt from the ground up to support several new features:

- Ability to save pinned report as both a graph and grid to dashboards (previously was either/or).

- Ability to associate individualized, custom color "theme" with dashboard (previously all graphs used same system-delivered colors). See case 31004 for information on creating/altering color "themes/palettes."

- Multiple dashboards now display in tabular format as opposed to a single dropdown pick-list to switch between them.

- Ability to re-order dashboard tabs within the new tabular format by "dragging and dropping."

- Easier navigation to edit dashboard functionality via dashboard "Edit" icon and more user-friendly edit capabilities.

- Ability to define graph height and width within dashboard.

- Ability to add custom text to dashboard via Dashboard Notes.

- Pinned Report notes now display on dashboard, allowing the ability to add custom text to dashboard graphs and grids.

- Ability to "pop out" individual graphs into full-screen viewing mode.

- Ability to add filters to a dashboard that when changed will re-run the graphs/grids with the filter applied (if applicable to the individual graph/grid).

Case: 31004   Dashboard Color Palette "Theme" data entry page

To support new dashboarding functionality, institutions can now create their own color palette "themes" to be used on dashboards. Institutions can also modify delivered color palette "themes." Site Administrators can access this data entry form via Site Administration -> Layout -> Dashboard Color Palettes. Site Administrators can choose the "default" palette. The "default" palette will be used when creating new graphs and dashboards. People with the ability to edit a dashboard will then have the ability to choose the color palette "theme" of their choice on a dashboard-by-dashboard basis.

Case: 31202   Allow for "read only" access to Pinned Reports

When saving a Pinned Report, users (who have access to share reports) can now select any group that does not have menu access to the report which will allow members of that group (who don't have access to the report through some other means ex. another group/role or administrative status) to view the report results in a read only state.

Example of how you might use this functionality: You would like to share a report showing salary totals by department with department administrators. You do not want to show them the detailed underlying salary records, nor give them access to the report that would give them access to the detailed records. You only want them to be able to view the pinned version of the report you created which shows the salaries summarized at the departmental level. Perhaps you want to put this on a dashboard, or just give the users the ability to execute this as a pinned report. In this scenario, you can put those users into a group and give that group read only access to your pinned report without giving them menu access to the underlying report.

Case: 31339   Create new audit report for Restricted Fields

Added a new report in each application under Administration -> Information -> Restricted Fields. This report will show what fields are restricted within a given application, what pages those fields are on, what roles restrict access to the fields, how many users currently belong to the roles, and whether a Restricted Field has been used in a Virtual Column.

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Client specific cases may or may not appear in this list, depending on their impact on the baseline applications and / or site specific settings.

Case: 31556   Allow individual users to turn off sticky filters via profile setting

Added a user profile setting (accessed via the User Name button in top right corner next to the Logout button) to toggle Sticky Filters on or off. This setting is user specific, but affects all reports in all applications that the user has access to.

Case: 31596   Update Dashboard sharing options

- Users who have the ability to share Dashboards (site administrators, application master users, or users with the Dashboard Administrator role) can now specify two levels of security on Dashboards: View access and/or View & Edit access.

- View access works the same as before: any user in the group(s) can access the dashboard.

- Users within groups assigned View & Edit access to the dashboard can view the dashboard like normal. Additionally, members of View & Edit groups who ALSO have the Dashboard Administrator role (i.e. an intersection of these two groups/roles) can also edit/update/delete the dashboard. Site administrators and application master users can edit any dashboard to which they have access.

- For Group Dashboards, the list of available graphs/grids includes all items that any of the groups have access to. When users view the Dashboard, some users might not have access to every group, therefore they might not see every item.

Case: 31598   New Graphing functionality

- Ability to view report data on screen while creating a graph.

- Ability to set the location of graph legend (top of graph, bottom, left or right).

- Ability to set label direction: horizontal or vertical.

- Ability to name graph X and Y axis separately from "grouping" series titles.

- New "donut" graph.

- Ability to click on the legend to remove a line/bar representing that legend value. This re-calibrates the scale of the graph providing better viewing of the smaller values in the graph if a larger value is removed. Clicking back on the legend brings the removed line/bar back into the graph.

Case: 31679   #Substitution# filters should not show compare options, cannot be disabled

Updated the page builder wizard: when building a page that uses #Substitution# values in the query the associated filters are mandatory, cannot be disabled, and cannot show comparison options.

Case: 31733   Additional hyperlink formats

Added more hyperlink font-style options to Hyperlinks tab.

Case: 31858   Replace "public" options with "All [Application Name] Users" role

To replace "public" options (such as public Pinned Reports, public Dashboards, etc) new security roles have been created in each application: "All [Application Name] Users." These roles will be automatically loaded each day with every user who has any security access to each application.

Client specific cases may or may not appear in this list, depending on their impact on the baseline applications and / or site specific settings.

Case: 31859   Update Pinned Report sharing options

Updated group security options for Pinned Reports:

- Pinned Reports can now be assigned to as many groups as you want.

- Users who have the ability to share Pinned Reports (site administrators, application master users, or users with the Create/Update Group Pinned Reports role) can now specify three levels of security on Pinned Reports: view, view & edit, or read-only.

- Users with view access work the same as before: any user in the group can see and run the Pinned Report.

- Groups set up as view & edit access will allow any members of that group who also have the Create/Update Group Pinned Reports role (i.e. an intersection of these two groups/roles) to run and also change/update/delete the report.

- Users with read-only access will be able to view and export the report results but will not be able to change anything else for example filter options, column filters, grouping, graphing, advanced options, etc. Please note that if a user is a member of a group that is set up as read-only but that user is also a member of another group/role that has full access to the underlying menu item, those users will not see the report in read-only mode since their other access allows them to navigate directly to the menu item and run the report any way they want anyways. See case 31202 for more details.

- A significant change here is that groups must now be assigned direct menu access to the underlying report otherwise the groups won't show up as available options in the sharing dropdown lists. This is the case for view or view & edit access. The read-only dropdown list will only show groups that do NOT have menu access to the report.

Case: 31861   Update Pinned Reports homepage tab and page level dialog

Removed public reports section. Updated group section to roll up by group name.

Case: 31982   Scheduling monthly reports with interval > 2

Fixed a bug when scheduling a monthly report with a recurring interval > 2. When recurring every month or every second month the system was working properly, but when recurring every 3rd month (or less often) the system was not correctly calculating the start date or recurring dates.