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***FASTAR***

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**Case: 34725 Allow Payments screen to export to Excel**

Added the ability to output the Deposit Listing report (off the Record Payments screen) to output in Excel format.

**Case: 36351 Batch Listing date range filters not inclusive**

Fixed a bug where the "To (optional)" date filter on the Batch Listing report was not inclusive, meaning invoices posted today would not show up if you filtered on today's date.

**Case: 36427 Allow blank deposits to be completed**

When configuration setting #150 "Create Payment JV when closing Deposit Number" is turned on, an empty Deposit Number with no lines could not be completed. This has been fixed.

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## **FASTBUDGET**

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### **Case: 32223 Create Benefits for Multiyear**

Added the ability to define benefits by Effective Year within a Fiscal Year. This allows for the management benefits with MultiYear Development Series. To enable please contact MCSL. Configuration setting 205 is used to enable this functionality.

### **Case: 32392 DevEntry add SAL security**

Added ability to restrict access to Salary records in Development Series. Similar to SAL access in Finance, if Configuration setting 205 is enabled then only users with the "DEV\_SALARY\_ACCESS" will be able to see Salary records in Development series. This does not affect Budget Transfers or Budget records. To enable please contact MCSL.

### **Case: 34231 Allow for Budget Transfers that only post to development, and not have to post to budget admin**

Added config setting 393 - 'Allow Budget Transfers without Budget Series (Y/N)'

If this setting is set to 'Y' then Budget Transfers can be created without a specified Budget Series. A Budget Transfer without a Budget Series will only update a specified development series when posted. Normal approvals are still required.

### **Case: 35066 Allow more than 1 future year Dev Series**

Added the ability to have more than 1 development series for a given future Effective Year.

### **Case: 35108 Position Analysis Report**

New report Position Analysis. This report provides a Multi-Year view of Positions including previous years Actuals, previous year Budget and future effective year development series values.

### **Case: 36343 Budget Transfer Details report**

New Budget Transfer Details report. Similar to the Budget Transfer Status Report but this report shows and allows filtering on Budget Transfer Details not just header information.

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## **FASTFINANCE**

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### **Case: 25598 Allow Financial Statements to be set as active or inactive**

A checkbox has been added to the Financial Statement Editor to indicate whether a given statement is active or inactive. The default value for all existing statements and any newly created statement is active.

Inactive statements will not be built during the nightly Data Refresh process. This will improve the performance of the Data Refresh if statements that are not regularly required are turned off. For example some statements may only be needed at certain times of the year, or may be from prior years and no longer required but need to be kept for audit purposes in the future.

Inactive statements can still be manually built and viewed using the "Rebuild and Run" button on an individual one-off basis, or they can be re-enabled for a period of time and then disabled when no longer required.

### **Case: 34955 Create drop down list filter procedures for data entry forms**

Drop down and search box procedures created for use in client custom Finance data entry pages. Created for standard FINANCE fields such as Chart, Fund, Orgn, Account, Program, Activity, Location, Fiscal Year, Fund type, Account type, etc.

### **Case: 35249 Drill down on Q1 Actuals from IS summary not filtering correctly**

When drilling down from an Income Statement summary report (ex. Summary by Acct Detail) on the Q1 Actuals column, the Transaction Detail filter was filtering on <= fiscal period ex. <= 201803. This means the drilldown would actually show inception to date results instead of only that quarter. Other quarters were not affected because they had lower bound filters ex. >= 201804 AND <= 201806.

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**FASTHR**

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**Case: 34625 Disposition reporting**

The Payroll History report now runs in either warehouse mode, selecting data from the warehouse, or in Live mode, where it will run against the ERP system real time. This page was changed to include the live reporting so users could use it to validate payroll as it was getting run. By default, this feature is turned off and the page runs as it did before against the warehouse. If you want to allow a user to run it against the live ERP system you need assign the built in role HR\_LIVE\_REPORTING to that user. This will give them the ability to select where to run the report from.

**Case: 34990 HR refresh move remaining tables to STAGE tables for refresh**

Add STAGE tables to warehouse to improve refresh times. (note this will consume additional disk space)

**Case: 35219 Reconfigure HR indexes on large tables**

Rework indexes on large tables to improve query response times.

**Case: 36365 Add fields for Faculty tables**

Add following fields to faculty tables:

FACULTYCONTACT  
-activity\_date

FACULTYRANK  
-rank\_desc  
-institution\_rank\_code

FACULTYAPPT  
-tenure\_desc

FACULTYSABB  
-cf01\_code  
-cf03\_Code  
-next\_date  
-lrea\_code\_next  
decision\_defer\_date  
-decision\_date  
-trans\_no  
-comm\_full\_date  
-appeal\_date  
-activity\_date  
-user\_id

FACULTYLIST  
-discipline\_Code  
discipline\_desc

**Case: 36405 Update coding fields for actv and locn**

Update refresh to add activity and location into coding fields for payroll reporting

**Case: 36412 update job history function for new refresh**

Update function for class code on all jobs to get the e class from the job history table that cooresponding to the job at that time, or if not found, use current e class from person record

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## **FASTSTUDENT**

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### **Case: 30065 Tuition and Fee Revenue by Course**

New functionality breaks down charges assessed via Student Fee Assessment process by course. This allows institution to determine total tuition and fees generated by course, department, college, instructor, etc.

FAST calculates these amounts by course in two ways, depending upon institutional term setup. If the institution has set up the system to "track charges by CRN", this means that charges are automatically broken down within ERP system by Course (CRN). In this scenario, FAST simply uses the CRN associated with each charge.

If the system is not set up to "Track Charges by CRN" for the term, FAST uses fee assessment audit records, system fee assessment rules, and course fee rules to calculate the charges retroactively and attribute charges to the appropriate courses.

NOTE: At this time, course fee calculations are only performed for charges which 1) have a Course (CRN) associated with them on student account OR 2) were assessed via the fee assessment process and have a 'Source' code = 'R', which means assessed via registration. If your institution assigns fee exemptions to students (Source = 'E') or processes "Refunds by Total", those specific dollar amounts are not broken down by course. You can see these dollar amounts on the "Student Account to Course Charge Audit" report found within the Student Accounts menu. If your institution currently includes charges with a source code other than 'R' in your course revenue reporting and would like them included within FAST, please submit a customer support ticket.

### **Case: 35195 SFRFAUD, SFRRFCR, SFRRGFE, SFRRFND stage tables**

The following new stage tables exist: STAGE\_SFRFAUD, STAGE\_SFRRFCR, STAGE\_SFRRGFE, STAGE\_SFRRFND

### **Case: 36310 Tuition, Fee, Other charges in Enrollment Summary and Course Summary Reports**

Three new columns exist on the Enrollment Summary and Course Summary reports:

- 1) Tuition,
- 2) Fees, and
- 3) Other Charges.

These columns display the total tuition, fee, and "other" charges attributable to the course. FAST course calculation process assigns charges assessed via the Fee Assessment process to courses (with AR Source Code = 'R').

### **Case: 36322 Course charge columns added to SYNSCHEDULE\_SUMMARY and SYNSCHEDULE warehouse tables**

New columns added to SYNSCHEDULE and SYNSCHEDULE\_SUMMARY warehouse tables to support Course Tuition & Fee reporting:

- 1) TUITION\_CHARGES: Total of all charges assessed with an AR category code = 'TUI' and AR source code = 'R' (egistration), which are attributable to course.
- 2) FEE\_CHARGES: Total of all charges assessed with an AR category code = 'FEE' and AR source code = 'R' (egistration), which are attributable to course.
- 3) OTHER\_CHARGES: Total of all charges assessed with an AR category code that is not 'TUI' or 'FEE' and AR source code = 'R' (egistration), which are attributable to course.

### Case: 36339 New Warehouse tables to support course revenue project

**SYNFEE\_AUDIT\_BASE:** Contains select fee assessment audit records used to determine fee course calculations. For terms in which school tracks by CRN, student account information is used to determine course fees so this table is not populated at this time. Built from STAGE\_SFRFAUD.

**SYNFEE\_AUDIT\_DETAIL:** All charges assessed via the registration module (source\_code = R) merged with appropriate Audit History records.

Primary sources are SYNSTUDENT\_ACCOUNT\_INFO, SYNFEE\_AUDIT\_DETAIL, SYNCHEDULE\_SUMMARY, STAGE\_SFRRGFE.

**SYNFEE\_RULE\_COURSES:** Using audit records and fee assessment rules, FAST determines which classes meet fee assessment rule criteria. This table is only populated for terms in which school does not track by CRN. Primary sources are SYNFEE\_AUDIT\_DETAIL, SYNINVALID\_REG\_RECORDS.

**SYNFEE\_RULE\_CRSE\_CHARGES:** Contains FAST calculated tuition and fees by course. This table evaluates charges for courses identified in SYNFEE\_RULE\_COURSES and attempts to calculate charge amount for each.

**SYNFEE\_COURSE\_DETAIL:** Final FAST course charge calculations by audit record, student, term, course, detail code, source. Combines together charges from SYNFEE\_AUDIT\_DETAIL with course calculations in SYNFEE\_RULE\_CRSE\_CHARGES.

**SYNFEE\_SUMMARY:** Totals FAST was able to assign to courses vs. not able to assign to courses by Detail Code. Used in Course Fee Audit reporting. From FASTSTU.SYNFEE\_COURSE\_DETAIL.

**SYNFEE\_ACCOUNT\_AUDIT:** Created to audit FAST course fee calculations against student account totals. Combines together charges from FASTSTU.SYNFEE\_SUMMARY and FASTSTU.SYNSTUDENT\_ACCOUNT\_INFO.

### Case: 36346 Student Account to Course Fee Audit Report

The new 'Student Account to Course Charge Audit' report was created to help schools review total charges assigned to courses via the new FAST Course Tuition & Fee calculation process. With this report, you can compare the totals assigned to courses vs. the totals within Student Accounts Receivable to identify any discrepancies.

**NOTES:** At this time, SFRRFND (refund by total) re-assessment charges are not assigned to courses. Exemption credits are not assigned to courses either. If your institution includes these in course fee assessment report totals, please submit a customer support ticket.

Examples of where discrepancies may occur between Student Account and Course Fee Assessment Calculation totals:

- 1) a. Course fee assessment process executed for student,
  - b. one of the fee assessment rules applies only to courses with a particular attribute
  - c. attribute then gets removed from course
  - d. Fee assessment process not recalculated for student.
  - e. In this scenario, the charge would still exist on the student account, but would not be attributable to the original course as the course attribute no longer exists and the ERP does not save course setup history. There is no way for FAST to know that the course originally had an attribute assigned to it (and is the reason for the charge).
- 2) a. Course fee assessment process executed for student,
  - b. Total charges exceed maximums established for detail code and X dollars are refunded onto student account
  - c. charges are assessed via multiple fee assessment rules
  - d. System does not determine which rule the refunded total should be attributed to.
  - e. In this scenario, no fee rule is associated with the refund. ERP just notes that max was reached and refund was given.
- 3) Somehow a charge gets manually assigned with a source code = 'R' and no fee assessment audit record or associated CRN exist.

**Case: 36347 Course Tuition & Fee Summary Report**

Under Course Info menu, new Course Tuition & Fee Summary Report exists. The purpose of this report is to analyze Tuition and Fee charges from a variety of perspectives. Analyze total tuition by campus, department, college, etc.

From here, you can also drill down to the individual student/course level.

**Case: 36348 Course Tuition & Fee Detail report**

Under Course Info menu, new Course Tuition & Fee Detail Report exists. The purpose of this report is to analyze Tuition and Fee charges from the individual student/course level. Note that many additional columns exist on this report that are not delivered "turned on". It is recommended that you review additional columns via the "administration" tab to determine which columns make the most sense for your institution.

This report is also very powerful to use with Advanced Options to sum the data a variety of different ways.

**Case: 36466 Create data entry drop down lists for existing student filters**

Drop down procedures created for use in client custom Student data entry pages based on existing student drop down filters.

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## ***Global Changes That Affect All Applications***

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### **Case: 33966 Improve how training videos are displayed**

A new interface was created for training videos. This includes playlists, tags, improved search, and the ability to administer videos and playlists to customize names, sort orders, etc.

### **Case: 34902 Pinned Reports Maintenance page**

Removed the "Maintained By" column from the Pinned Reports administration screen.

Moving forward, if a shared Pinned Report needs to be modified by someone other than the creator, the "View/Edit Roles" column will be the only option available to allow for this.

### **Case: 35035 Add the ability to format and label aggregated columns**

When applying a Group Function via the Advanced Options tab to aggregate a column (ex. COUNT on a column named "Student ID") the column can now have the title updated and the display format overridden.

For example if you wanted to rename the "Student ID" column to be "Count of IDs" you could. It might have been confusing if the count returned 1234 results and the user thought there was one result with Student ID = 1234.

Another reason to add this was to allow the format to be overridden. If the original column had a format set to "number, no decimals" then an AVERAGE function was applied you may want to see decimals for example.

### **Case: 35043 Object list in Query Builder**

Administration forms have been created for administrators to create synonyms or views for objects that the query schema has access to from the other side of a database link. There is also an administration form that can be used to restrict the object list to only specific schema and object types. These forms are named External Object Types and External Objects under the Query Builder menu.

### **Case: 35191 Administration of training video playlists**

Created an administration page for Training Video Playlists. Administrators can edit existing baseline playlists or add/remove their own training video playlists. This is located under Site Administration -> Information -> Training Video Admin -> Playlist Admin.

### **Case: 35211 New Advanced Options**

Improved the layout and functionality of the Advanced Options tab on reporting pages:

- functionality is organized in sections.
- sort order is broken out into it's own section.
- all column titles, output formats and alignment can be overridden by end users (these changes are execution specific and can be pinned, but they are not "sticky" and will reset back to default when the report is re-loaded).
- sections are collapsed by default unless used.

### **Case: 35260 Administration of training videos**

Created an administration page for Training Videos. Administrators can edit existing baseline videos (to change titles, sort order, tags, enable/disable, etc) or add/remove their own site specific custom training videos. This is located under Site Administration -> Information -> Training Video Admin -> Video Admin.

### **Case: 36360 click on row to highlight**

When you Click on a line anywhere in a report or data entry grid the selected row will highlight the line you are on and stay there. This is especially helpful on reports and data entry pages that scroll horizontally so you can tell what record you are on.

**Case: 36436 Speed up Pinned Report folder display**

In certain situations, pinned report folders took a long time to open. Modified queries behind pinned report page to increase speed.

**Case: 36452 Error Adding filters to Data Entry pages**

Resolved issue from 4.4.03 - Error encountered when adding filters to data entry pages.