FASTFINANCE

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.

Global Changes That Affect All Applications

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 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.

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: 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.

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