Release Notes: Version 4.5.03

FASTBUDGET

Case: 40335   Add Adjusted Budget to Budget Current Year Summary reports

Added an Adjusted Budget column to Budget Current Year Summary reports.

Case: 40424   SUMM group by *-Acct Virtual Column Sub total not matching Total logic

Fixed a bug on the Summary by FOAPAL report where a virtual column subtotal row was showing the straight total and not taking into account Acct Rev less Exp logic. The Total row is calculating correctly.

Case: 40457   Error on Forecast OS for users who don't have access to the Forecast series

Fixed issue on the Forecast page if the user does not have access to the forecast series they would get an unrelated error.

Case: 40519   Add Sort Order column to Manage Development Series page

When managing Development Series there is now a "Sort" column and a "Dev Column in Finance". These columns will be populated with the values from the prior "Dev" column.

"Sort" is used to specify the display order for the Development Series on the Manage page and on Budget reports.

"Dev Column in Finance" is used to identify the Development Series to show in Finance on the "User Defined" reports as "Budget Development 1", "Budget Development 2", etc. This allows for new functionality where more than one Development Series can now be included for each of the "Budget Development" series shown in Finance.

Case: 40566   Label changes on query import pages

Updated several labels on pages to better reflect and clarify the process. Most labels were changed around the Admin Import Wizard and Management pages. (There was no change in functionality in this case)

Case: 40607   Budget SUMM data grouping problem if first sort parameter is Actv or Locn

Fixed sorting issue on Summary by FOAPAL report if first element is Actv or Locn.

Case: 40904   Budget Transfer page should not have datagrid Excel Import options

The Budget Transfer page Export to Excel icon should not have had the arrow up to indicate importing from Excel. To import from Excel on this page, there is a specific button which will launch the import wizard.

Global Changes That Affect All Applications

Case: 34630   Keyboard shortcut for Execute button

Added the ability to execute reports using the combination 'Ctrl + Enter' keyboard shortcut. This will work for most pages that contain a green 'Execute' button. This feature will work on the Filter Options, Advanced Options, and Report Results tabs.

Case: 40221   Emphasize "Data as of" label when data is more than X days old

Added a warning icon with an information hover pop-up to appear beside the "Data as of..." label in each application when a Data Refresh has not run successfully since a specified period of time.

The refresh warning threshold can be set for each application using configuration setting 5102 - "Warn users if data refresh has not run successfully for [N#] number of hours." This has been set by default to 48 hours.

Case: 40281   Ability to kick off refresh from site admin

Created a new page "View Data Refresh Status" under the Administration menu in the Site Administration application. This page adds the ability to view and manually run any scheduled jobs created in Oracle for the application.

To manually run data refreshes users must be assigned the PORTAL_REFRESH role.

Case: 40303   Change nomenclature of Filter administration

For clarification purposes, the prior name "Control Labels" has been change to "Filter Labels". Additionally, the name "Page Details" has been changed to "Page Options".

Case: 40443   Improvements to Report Scheduler to allow concurrent report executions

We have made several improvements to the Report Scheduler service to allow additional configuration options and to remove (or at least reduce) bottlenecks when many reports are scheduled to run at the same time.

Case: 40468   Field Search

Added a new report named Field Search under the Help menu in each application.

This report allows users to search through all columns, filters, menu items, report titles and report descriptions to find any given phrase or field name. The report will only return results based on the user's menu security i.e. only fields on screens they have access to.

Case: 40567   Add ability to disable a stage table in the refresh process

A new active indicator has been added to the control table for stage tables. This will allow baseline stage tables to be de-activated so they will not be populated as part of the baseline refresh process. Note that inactivated stage tables will still be truncated during the refresh process.

Case: 40602   Improve performance of FX button

To greatly improve performance, we have removed the "Values: 12,345 records" label from the list of Dynamic Selections when a user clicks the FX button next to a filter control.

This preview will still appear for Dynamic Functions such as "Current Term" in Student or "Current Fiscal Period" in Finance, and for manually created Dynamic Selections that were uploaded from Excel or created from custom queries.

The vast majority of Dynamic Selections were created from the column context menu of Report Results and now that this feature is easier to use, lots of users have quite a few selections which can take a very long time to execute just to count the results. Having a record count is nice, but considering it can take minutes to pop up the list instead of milliseconds, we felt the pros outweigh the cons of removing this label.

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