FASTFINANCE

Case: 39014   Change Fiscal Period filter from dropdown list to hierarchy list

Converted all the Fiscal Period filters on foundation reports to use a new style hierarchy list. Instead of picking a fiscal period from a list that contains hundreds of periods, the fiscal years are now collapsed. Individual periods within a year only show when the user clicks on a given year to expand it. The current fiscal year is expanded by default for easy access. The current fiscal period is highlighted in bold, and all year end periods are highlighted in italic.

Case: 40239   Alternate Hierarchies for Balance Sheet reports

Added Alternate Hierarchy functionality to Trial Balance and Balance Sheet reports.

Case: 40476   Payee Name case-insensitive

The Vendor/Payee Name filter on the Invoice Query screen is no longer case-sensitive.

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

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.

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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.

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