Adjutant Desktop Release Notes

Version 1612.1607

ECR #	Type	Module/Program	Requested Change:	Change Summary:
27272	Enhancement	Accounts Receivable Cash Receipts Dist Cursor	Add the invoice project number to the cash receipts distribution report (PRINTCASHDIST) cursor.	Add msnnum to cursor to show linked project.
27273	Enhancement	Accounts Receivable Customer Statement report	Add a Project # filter and an "Include Paid" option to the customer statement report.	Add project filter. Add Include Paid checkbox. Only allow use of include paid option when project filter is selected.
27221	Enhancement	Address Book Add "Grease Trap" Flag	Exactly like the "backflow connection" ECR 27162, add a "Grease Trap" flag to the connection info screen.	Add grease trap to connection info screen (conninfo.gtrap)
26217	Enhancement	Bank Reconciliation New Bank Integration Logic	Add a new tab to the Bank Rec screen called "Bank Integration". This tab will have capabilities of importing a bank rec file from different bank CSV outputs. See Doc Vault for rough sketch of the new tab. • Process button should move all selected lines (both unmatched and matched) to the Check/Dep/Adjust tab. Matched lines will be cleared, unmatched lines will be uncleared. Lines will need both the select and clear checkboxes checked in order to be cleared (this should be the default for Matched lines). • When the process button is clicked, display a popup that says "Process to Bank Rec?" Give yes or no choices, if yes, proceed, if no, cancel. • Once you process and click yes to proceed, jump to the Filters tab. The selected lines should be removed from the grid, the unselected lines should stay in the grid on the "Bank Integration" tab. • Importing a new file should not delete or replace any existing lines	Add logic to allow import of csv from bank (Rule added to create import file types (BANKRECIMP). Use import type selected to run correct code to process import file into standard format, then try to match items for clearing. Match checks on number, deposits on amount and date. Matched items are flagged to clear. Any item can be flagged at import as adjustment, and can be posted to GL. Add new Prosperity logic (add to BANKRECIMP Rule). Add new grouping auto match logic to look for groups of deposits that match total of deposit in file. Add logic to match only to uncleared items. Add A/N buttons for selected columns. Make Org Readonly, add GL mask to Offset account column (validated during Update). Update adjustment logic to set cleared flag based on cleared column. Add logic to match on check amount also when matching by check number. Remove Refresh button.

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			in the grid. Add import logic to the new "Bank Integration" tab of bank rec. When a file is imported, the information should populate in the grid. The import should try to validate against what is currently in the Adj bank rec using the Docno (or refno). • When someone browses and selects a file to import, a match up screen should appear (this will be a newly created screen). The user will manually match up the columns from their file to the correct field in Adjutant the first time they import a file. If they import a file with the same format again, the columns should already be matched. • If a match is found, the line should be highlighted green and should have both the "Select" and "Clear" checkbox columns checked. If no match is found, the line should be highlighted red. • Lines that come over as unmatched should be able to select a customer using a type ahead in the customer column, then they will select a type from a dropdown list in the column (Check, Deposit, Adjustment). Adjutant will then generate a list of possible matches to be selected from in the Match Doc column. • If the Adjustment type is selected, they should not be required to select a customer or ref# to match it to.	
27103	Enhancement	Custom Reports Time Entries Report	Create a new report that looks just like the Pending Backup Report (SVRDETAIL). This report should have a filter for supervisor and a	Create report per spec.

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			filter for date range. The purpose of this will be to provide supervisors a report that looks like the Pending Backup Report without having to send the tasks to billing.	
26978	Enhancement	ECR ECR Report Status	Add "Scoping" to the approval status drowpdown in order to filter by ECR's in scoping phase.	Add scoping as option on Print ECR List, status dropdown
27235	Enhancement	Item Control (Inventory) Cycle Count Columns	Add columns for ABC Code, Commodity Code, Item Class, and Price Group to both the Pending Counts tab and the Completed Counts tab of the Cycle Count screen.	Add ABCCode, Item Class, Price Group and CommCode to both active and pending grids. Add sorts to all columns.
27283	Enhancement	Item Control (Inventory) Coil Display Card	Make the PO number in the DISPLAYCOIL screen a hyperlink to load the PO screen with the associated PO record.	Add drilldown to PO screen for linked PO.
27195	Enhancement	MBS Integration MBS Grid	Update SO generation logic to use suffix from MBS SO Type rule when checking for duplicates during number generation. Current logic only uses prefix.	Update SO generation logic to use prefix and suffix when checking for duplicate SO numbers.
27271	Enhancement	MBS Integration MBS Import (MBSGRID)	Create SO-sotype event when making new sales order.	Create SO-SOTYPE-WHSE event when adding sales order via MBS Grid import.
27207	Enhancement	Production AMS Processing	Update AMS production processing to process usage first, then process assemblies. This will handle the case where scrap usage is later in the usage file than the good assembly lines.	Alter Usage Processing logic to process usage first, then process assemblies.

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27230	Enhancement	Project Management Project Review Report	Update the title for the PROJREV screen to 'Project Review Report' rather than 'Project List Report'.	Change Title to Project Review Report.
27252	Enhancement	Report Sets Tax Report - Invoice Backup	The tax type totals do not sum correctly (reset on wrong group).	Correct issues with grouping totals on tax2 report.
27025	Enhancement	Task Management AVR Imports	Add 2 new LOG fields to the INSGRP rule for Default and for Include on Water Generator (verbaige can be different). Default will be the default option that appears in the drop down list, Include on Water generator will flag that Service Order Group to show up in the drop down list options on the Waterapp screen. Add logic to the new waterapp.scx that would allow importing files from AVR. The importer should have the following columns: -District (District name, not custno. This should validate against Company name in Adjutant) -Physical Address (validate the first 10 characters of the addes. If not matched, come over as red) -Source (validate against the text 2 field on the INSGRP rule where that rule entry has the new LOG button checked. Validation issues with this field should stop the import, not just come over as unmatched) -Subdivision -Serial # (validate serial against conninfo mnum for address) -Last Read When a line is imported with a validation issue, the whole line should be highlighted red, and the incorrect cell(s) should be	Add Default and WaterApp as log1, 2 on insgrp rule, limit to items with waterapp set. Default to default item. Change import to use new format. Fail import if items don't have valid source code. Make new DISTXREF rule to cross district names to custnos. Try to match via imported district name, if not match use rule to match , fail if both matches fail. Add new color coding logic on subdiv and meter. Add new meter update logic and subdiv update logic (double click on meter to allow update of Adj Meter to AVR Meter), SubDIv can be changed using dropdown in grid. Tasks can be generated as long as district and address are matched. Add new AVRIMPORT org attribute, include orgs with attribute in lower district filter. Change prompt to show first and last work order number generated.

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			highlighted yellow. To try to match the unmatched records, give dropdown options like the Sales Order Update Tool grid does. When tasks are generated from this screen, the task description should be a concatenate of the regular task description + "Serial: (value from column)" + ", Last Read: (value from column)"	
27220	Enhancement	Task Management Task Screen ShipTo Lookup	Right click on Ship To lookup for inhouse tasks is incorrect. Should be based on task customer, not task shipto (to match left click logic).	Make right click on shipto show task button (complete), use soldto as linked org for inhouse type tasks (to match the left click logic).
27222	Enhancement	Task Management Grease Trap Filter on WO Generator	Exactly like the "backflow" filter from ECR 27163, add a filter to the work order generator for Grease Trap connections, based on the flag to be created in ECR 27221.	Add G button to select connections flagged with Grease Trap.
27267	Enhancement	Task Management Task Screen	The task contact is showing as selected on a task when it is created, but it is not truly being added (at least in the task grid) until you tab past the contact itself. This is misleading to the task creator, who can't really tell if it has taken or not.	Update logic to save auto selected contact without having to tab through the contact field to update.
26966	Enhancement	Time and Materials Subcon Timesheet Import	Create a new import screen that will allow importing a file to close out tasks and POs. The file should have the following columns: Service Order - validate Resource - Create RID for paramount, import should use RID	Create importer per spec. Sample xls file attached to ECR. Add logic to receive PO during closing process, and close PO. Insert notes from solution code into timesheet notes for labor line.

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			Date - validate format (mm/dd/yy) and posting window Solution Code -validate Inspection Status - validate against TASKINSPECT rule text 1 Task Internal Notes Task Completed By - Validate against userid Complete Date -validate format (mm/dd/yy) The second part of this import will be used to -link to an existing PO -insert record into potran with hard coded item (SUBCON), imported description, imported cost (see below) -Close the PO and complete the service order (but not lock) PO Number - validate record (po must be a. existing -"PO Does Not Exist", b. open - "PO # xxxx is Closed, cannot import") PO Description -text from importer Purchase Cost - validates on numeric character PO SvrOrd - validates service order number	
27056	Enhancement	Time and Materials Resource Pay Super Summary	Create a new version for the Resource Pay Hours Summary Report (MEMPPAY) for a Super Summary. The Summary version currently breaks it up into separate weeks, the Super Summary should group all like time into one result.	Add new supersummary version of report (summary without week breaks). Create new cursor format for super summary to match layout of attached xls file. Format is direct cut and paste thru total column into required xls format. Remove columns from super summary export. Change super summary report to remove columns not in cursor anymore. Update logic to handle 40 hr overtime logic

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				correctly when running in super summary mode.
27057	Enhancement	Warehouse Managment System Update to Detailed Bundle Tag	Make a change to the detailed bundle tag that will exclude lines with 0 quantity loaded. Change the base G_BUNDLE2 program, and the custom version of G_BUNDLEXXX.prg, where XXX is the cid.	Update g_bundle2 program to skip items with 0 qty when printing bundle tags. Need to exit and restart TermControlS program in session.

Total Number of Changes: 20