



Xytech Platform 2024 Release- Release Log- 11.0

Deprecation Announcements

Deprecated in this Release

Smart Client for End Users

Smart Client is no longer supported for normal users in version 11.0 and beyond. Smart Client will still be supported for Layouts and Report Writer until a replacement of equivalent functionality in the web UX is made available in a future release.

Configuration

The Application Server configuration entry for SKY_BROADCAST_CHANGES is deprecated in version 11.0 and beyond. It has been determined that this setting was causing major, unnecessary performance issues in systems with 100 or more users. Going forward the system will not broadcast changes to all user sessions. Users will continue to receive changes from other users upon re-opening a particular Maintenance Document or Search List. This primarily affects refreshing of searches, and the population of dropdown lists when new values are recently added. Broadcasting of booking changes into the Schedule Book will remain active.

APIs

REST API v1 is deprecated in version 11.0 and beyond.

Pre-Announcing Deprecations in Future Releases

APIs

SOAP API will be deprecated in a future version. It is recommended you do not use it for any new development.

Begin now to port all integrations to the REST API v2 and be sure to take advantage of the new Web Hooks features now available for outbound integrations. The ability to utilize REST API V1 will be removed starting with version 11.1.

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Additions and Enhancements

APIs & Integration

System Service to Schedule Auto Load Actuals on Budgets

A system service has been created that can run every day during off hours that, based on certain parameters, will perform Auto Load Actuals on multiple Bids. This ensures that a time-consuming process is run automatically keeping the Bid actuals updated. [6349 / tdo172663]

API for Vendor Security

REST API call results are now limited by the calling user's Roles and Vendor limitations. [6713 / tdo167042]

How to Prevent Services from Restarting their Schedule when Service Engine Restarts

System services have been changed to observe the value of 'Last Date Processed'. This allows the service to resume the run schedule when the server is restarted. Previously, the scheduled run was based on the current time. [6852 / tdo170220]

Oracle HCM Actuals System Service

A System Service will be executed that will retrieve HCM Actual information. Usually this will match to one Transaction. When a Transaction match is found, Rate data will be updated, and Actual data will be created. This data will then be loaded back to the Working Budget. Occasionally a Work Order or a Transaction will not exist. If this is the case, they will be created in addition to the Rate and Actual data.

Prerequisites and Limitations: The integration will request this information every 2 weeks on Friday to align with payroll. [6889 / tdo159500]

Oracle G/L API Facade: Labor/Non-Labor Actuals & Committed Costs

Custom fields are now available on JmActual, and External Key is now available on JmBillingCode. [6890 / tdo159502]

Kronos to MP Off Days Integration

There is now a flat-file integration between the Xytech Platform and Kronos. It is a one-way integration where Kronos exports time off information to a flat file and MediaPulse picks it up to import the information into MediaPulse.

Prerequisites:

- MediaPulse requires read access to Kronos's public SFTP server where the flat file is created. Kronos integration team on the customer side will need to provide these endpoints to the individual configuring the Platform system.



- The Oracle HCM and/or Kronos HCM feed will need to have all the necessary resources already created in MediaPulse to do a full test of this integration. [6893 / tdo157495]

MediaPulse to Kronos New Project Transaction

A flat file integration between the Xytech Platform and Kronos is now available. It is a one-way integration where the Platform exports a flat file of data to a Kronos cloud SFTP and Kronos picks it up through a scheduled event. Data is based on Order Transactions and related data.

Prerequisites and Assumptions:

- The Xytech Platform requires write access to the Kronos cloud SFTP location, which is where the flat file will be placed.
- It is assumed that no transaction will be deleted but instead set to a phase of Cancelled or Void. This should only affect the Media division.

[6894 / tdo157499]

API for Vendor Portal

A series of new REST API calls now allow a third party to perform each of the activities required by a Vendor that would otherwise be done by interacting with the Vendor Services portal. The Technical Solution is a series of JSON calls to perform those activities. Previously, we reported a known issue where the vendor was able to access documents whose access was taken away due to the change in Quote Status. In this instance, the vendor may have been able to access the documents via saved links, favorites or via the API. That known issue has now been resolved. [9608 / tdo166995]

Add “Upsert” to Xytech REST API

The REST APIs now support 'upsert' capabilities by using the PUT method. An 'upsert' allows you to create or update existing records if they already exist with a single API call using the 'external_key' that represents the external identifier. Details are available from the Swagger documentation and REST API reference guide. [16076 / zd2872]

Bids and Budgets

Bidding Module and Budgeting Add-on

The Xytech Platform now offers a Bidding Module with an optional Budgeting add-on. Some new areas and features include:

- Load Actuals/Scheduled Costs-Counter Rules [6861 / tdo158426]
- Bid Collection Maintenance [6862 / tdo158427]
- Bid Detail List [6863 / tdo158428]
- Budget Background Configuration [6864 / tdo158429]
- Budget Maintenance Document [6865 / tdo158430]



- Budget Approval [6866 / tdo158431]
- Budget Load Actuals [6867 / tdo158432]
- Job-Budget Comparison [6868 / tdo158433]

User Can Still Add and Edit Restricted Billing Codes

Added functionality so that a user without 'Allow Restricted Billing Codes' Rights Code can not add or edit a Restricted Billing Code in a Budget Bid. [6806 / tdo163970]

Load Actuals Does not Load To Bid With Normal Pricing Billing Codes

Loading Actuals to a Bid is now working for transactions that have been actualized with a "Normal" pricing billing code [6807 / tdo163547]

Additional Bid Data Model Changes: Purpose

Bid 'Roll-up' has been renamed to 'Purpose' this will display the different types of Bids. This includes the following named values:

- N=Bid (default)
- C=Change Memo
- P=Project Consolidated
- D=Deal Memo
- W=Working Budget
- S=Snapshot Budget
- B=Budget

[6854 / tdo160148]

Cannot Default Budget Interval per Division

Users can now default Budget Interval per Division. [6858 / tdo163440]

If Markup % on Fringe Total is 0, then Bid Amount Should Not Display

Bid Details w/ Fringe = Total Billing Code Show Bid Amount even if Markup % is 0. This means that a Fringe Total detail may never be set to default to amount 0.

To preserve existing functionality, the following new options have been added to 'Fringe' (jm_billing_code.fringe): Total - Calc Always & 0% Total - Calc Bid Only & 0% If one of the new options is selected for the Total Fringe code, a Discount or Markup of 0% will multiply by the rate to calculate an amount like any other value. This applies to Transactions and Bid/Budget Details. [6869 / tdo166941]



Bid Preference: Load Rate From Source Doesn't Change Rate Set Units

A new Bid module preference has been added to modify how the 'Load Rate from Source' option works. The preference adds a setting so that 'Load Rate from Source' only updates Rates inside the Rate Set, leaving manually updated Units as entered.

Prerequisites: The Bidding module must be licensed and configured. [6872 / tdo167532]

Adding Billing Unit Multipliers to Budget Details

The Billing Unit Multiplier 1, 2 and 3 fields are now available on the Budget Details and Bid Detail Search.

Prerequisites: The Bidding module must be licensed and configured. [6874 / tdo164597]

Delete Budget Detail

A change has been made to the original design of budgets to allow linked detail between budgets to be deleted. In the Working Budget, detail can only be deleted if the Bid Amount is zero and no actuals have been loaded for it or linked detail in the Approved Budget. In a snapshot, detail can be deleted if the Bid Amount is zero. Deleting detail can create orphaned detail in one or another budget, meaning it no longer has a link in the Working Budget. The Job Bid Comparison – which is based on detail in the Working Budget – cannot show orphaned detail that is not in the Working Budget.

Prerequisites: The Bidding module must be licensed and configured. [6876 / tdo167281]

Additional Criteria to Use for Bid-Budget Details Linking to Order Transactions

MediaPulse Budgets will now have a Budget Type criterion for linking a Bid Detail to Order Transactions, in the Bid and on Order Transactions. The field will be used as additional criteria for loading actuals into bids.

Prerequisites: The Bidding module and Budgeting add-on must be licensed and configured. [6878 / tdo167846]

Out-of-Pocket Flag on Rate Set Tiers

The 'Out of Pocket' value on a Billing Code header is now reflected on Rate Set detail. For all but WO Actual Pricing, the values on header and detail will be the same. For WO Actual Pricing, the detail tiers default from the header but may be changed. In Bid/Budget, the bid detail will inherit the Out of Pocket value(s) from the Billing Code but, again, for WO Actual Pricing the tiers can be edited. The Bid header's existing 'Out-of-Pocket' totals will now calculate from rate detail rather than the Billing Code as a whole. In WO Actual Pricing, this allows for some but not all tiers to be marked for Out-of-Pocket calculations. 'Out-of-Pocket' does not show in or affect transactions. Site Summary: The site will now be able to indicate every action code on a W/O Actual billing code as either out of pocket or in house. The OOP and In House amount totals on the Bid Version will have to be changed to take



the Bid Amount, WIP Amount (ETC) and Bid Actual Amounts into consideration based on the updated billing code flag.

Prerequisites: The Bidding module must be licensed and configured. [6879 / tdo167865]

Bid Detail Search Changes & Budget Detail Search, and Fields from WO Actual

Additions to Bid Detail search:

- Result field to show the Quarter if the Bid has a Period Interval.
- Detail will now display even when amounts and Units are zero.

A new Budget Detail search document has been made available. This will show results based on Budget Detail, with bid detail and bid data on the same row rather than nested as in the Bid Detail search. Fields have been added to Bid detail searches and the new Budget Detail search. Values show from a specified tier of a WO Actual Rate Set:

- Regular: straight time
- OT & OTHER: For same-names Action Type
- Payroll Tax: For Payroll Tax Action Type

Prerequisites: The Bidding module must be licensed and configured. [6880 / tdo167005]

Displaying Transactions for Bid Detail Level

New 'Order Transactions' Actions have been added in Bids, Budgets, and Bid Collections to allow the user to search for all Transactions linked to a bid detail. If a bid detail is a header, it will look for all Transactions for any detail within the header.

To accommodate this, the Order Transactions searches have been updated to include criteria for Bid Version and Bid Detail. These options only work if Bid Linking is turned on in Bid Preferences.

Prerequisites: The Bidding and Job Management modules must be licensed and configured. [6882 / tdo156322]

Bid Linking Based on Trx Date to Bid Detail Date

When linking a Transaction to Bid Detail, the search will now consider the Transaction Begin Date to the Bid Detail date range. The search should only return Bid Detail where the Transaction occurs within its range. This also applies to the new Budgeting functionality introduced in version 11.

Prerequisites:

- The Bidding module must be licensed and configured.
- If needed, the Budgeting add-on must also be licensed. [6883 / tdo156536]



WO Actual Rate Set Breakdown & Scheduled Actuals on Bid Detail

Bidding and Rate Sets for 'WO Actual' Billing Codes have been modified to allow for granular budgeting by actuals. This is designed to work with the new Budgeting feature as well.

- 'Day' Unit Types may now define a number of hours per day. Bid detail and Order Transactions have been altered to recognize this and calculate a daily Billing Unit from hourly Actuals.
- Rollup Actions in WO Actual Billing Codes give users the ability to budget a generic amount in a bid then have specific actuals roll up from Order Transactions.
- Percentage Actions may be defined in a WO Actual Billing Code. A Percentage tier will set its Rate to a percentage of the total of the remaining tiers.
- 'Scheduled' values have been added to bid detail. There can be set as part of loading actuals, where Transactions that have been actualized will load into existing 'Job' actuals and non-actualized Transactions would load to the new 'Scheduled' actuals. This is governed by a new Bidding preference.
 - Counter Rules may be used in this process to break down non-actualized Transactions by penalty (Payroll Type & Action Type).
- Actual totals are now visible on bid detail headers.
- The WO Actuals Rate Set for bid detail has been altered to allow for:
 - Editing of the Unit.
 - Using the Percentage Action (see bullet above).
 - Loading Scheduled and Actual values.

Prerequisites:

- The Bidding module must be licensed and configured.
- The Scheduling module is required for use of Scheduling Counters.

[6884 / tdo156539]

Budget Fields AICE Bid Form

The 'AICE Bid Form' will now include Actual and WIP totals on the Bid Summary, Bid Version and Bid Details tables. These fields are new from the Budgeting work done in version 11.

Prerequisites and Assumptions:

- The Bidding module must be licensed and configured.
- 'Amount to Complete Actual' has been derived as 'Bid Amount' – 'Bid Actual Amount'
- 'Amount to Complete Total' has been derived as 'Bid Amount' – ['BID Actual Amount' + 'Bid WIP Amount']
- This breakdown is only available for the Bid Detail level; it is not available at the Budget Detail level.



[6887 / tdo163493]

Allow Edits to Bid/Budget Header when Approved

Added the ability to edit the Bid/Budget Header when the Budget has been approved. [6888 / tdo163744]

Bid Collection: Master Budgets

MediaPulse will now support the concept of a Bid, which is a way to view a collection of Bids. The Bid collection will always be unlocked, and the actuals will flow through the various Bids that are links to this Bid Collection. Actuals can also be loaded to the individual Bids from the Bid Collection. Bid Detail Search has also been expanded to include Bid Collection. Header and Detail rows can also display Actual information if it has been loaded into the Bid. [6891 / tdo156956]

Budget: Add Topside Action

The 'Add Topside' action has been added for approved Budgets. This allows a user to add or edit the Topside detail without having to unapprove and re-approve the Budget. This only allows access to Topside (restricted) bid detail for restricted Billing Codes.

Prerequisites: The Bidding module and the Budgeting Add-on must be licensed and configured. [6895 / tdo170115]

Bid/Budget Loading Actuals Build Trx/Bid Linkage

Added new fields to Order Transactions to better link to Bid/Budget detail when loading and re-loading actuals.

Prerequisites: The Bidding module must be licensed and configured. [6907 / tdo168825]

New Option to Not Refresh Rates on Order Transactions or Working Budget

Added a new option in various places when a user is asked if rates should be refreshed for order transactions or bid/budget detail. The existing questions occurred if something changed -- namely dates or Rate Card -- and the user must decide if rates should remain the same or if all rates except those manually edited -- i.e. 'manual rates' -- should be refreshed. In both cases, non-manually edited rates were always refreshed. The new option allows the user to keep all existing rates. Meaning, if a rate was \$100 it would remain \$100 after the change, no matter the new values that might otherwise cause the rate to be updated. The new option is also present in the duplicate functions for order transactions, orders, jobs and bids. [18646]

Calendar Gadget

Display Projects on Calendar Gadget by Project Start and End Date

The Calendar Gadget may now be set up to display bars for Projects. This is very similar to how Jobs are displayed.



Prerequisites and Limitations: The Scheduling module must be licensed and configured. [6922 / tdo169769]

Contacts

Mobile: Contacts

In the mobile app, a user may open an Individual or DBA Contact record to see contact and phone/email data. At present, only basic data is available and editable from the Contact record.

Configuration:

In the mobile app, a user may open an Individual or DBA Contact record to see contact and phone/email data. At present, only basic data is available and editable from the Contact record. [3888]

Framework – UX

System Service: Purge Attachments

A new standard System Service has been provided called 'Purge Attachments'. This can be set in place to periodically look for attachments that have expired and remove them. If the Attachment was uploaded by MediaPulse, it will delete the file as well. A new Event Trigger with Event Code 'MARKATTACHFORPURGE' has been provided for flagging attachments as expired. This trigger behaves like standard triggers, however instead of sending messages to a queue, the message will be sent to the System Service 'Purge Attachments'

Prerequisites:

- The site must be set up to run services.
- To allow MediaPulse to delete files, proper permissions must be granted to the application service account.

[6730 / tdo160904]

Job

Style Guides

Site may now set up a single Style Guide. This is, essentially, a list of attachments that are not linked to any particular record. Once defined, the Style Guide may be accessed via an action from:

- Operations List
- Service Search
- Bids
- Vendor Quotes
- Orders & Order Transactions



- Jobs

Note that this is the same list is accessed from different places. [6716 / tdo167103]

Vendor Quote Portal - Automatic Job Status Change

A 'Commission Job Status' has been added to Vendor Quote Status setup. This is an optional setting aimed at changing the Job's Status when a commissioned Quote's Status is changed.

Prerequisites: The Job Management module must be licensed and configured. [6714 / tdo168561]

Vendor Quotes: Job Attachments in Quotes List

A change to the previous design has been implemented:

- Add a 'Job Attachments' action to JmVendorQuote and JmVendorQuoteList.
 - If possible in JmVendorQuoteList, make a 'Job Attachment' column available in results so that it can show the number of attachments per records.
- In JmVendorQuote and JmVendorQuoteList, change attachments icon that now opens Job Attachments. Have it open the Quote's attachments per standard. New actions (above) will open Job attachments.
- MW2305 - Function needs to be available via API.

[6717 / tdo167104]

Vendor Quotes Portal - Quotes Maintenance and Search

Added a new Vendor Quotes maintenance and search, which displays Quotes relationship to Jobs. Users will be able to:

- Create and search for Vendor Quotes.
- Access Vendor Quotes from Job.
- Commission and De-commission Quotes.
- Send notifications from Quotes.
- Use the API to accomplish above.

Prerequisites: The Job Management module must be licensed and configured. [6719 / tdo164750]

Vendor Quotes Portal - Orders and Costs

Adds visibility of data from Orders per Quote. Users will be able to log in as a Vendor to see and edit limited Orders on Jobs linked to their Quotes.

Prerequisites: The Job Management module must be licensed and configured. [6720 / tdo164753]

Add Custom 1, Custom 2, and Custom Checkboxes to Billing Code



Adds Custom 1, Custom 2, Custom CB 1, and Custom CB 2 to the Billing Code maintenance application. [6856 / tdo160525]

Rate Card Editing

The Billing Code (JmBillingCode Doc Id 10309) document now provides a Bid Unit Type field, and the Rates (JmRate Doc Id 10353) document now provides Rate Sets. A 'Rate Set' is one or more rates defined for a single row, such as an Order Transaction or Bid Retail. The set can contain multiple rates when a Billing Code is one of the multi-rate Pricing options, such as Volume, Multiple OT, WO Actual, etc. A Rate Set is created and assigned to a Transaction or Bid Detail. [6860 / tdo158425]

Re-Class Utility Enhancements

The Re-Class Utility now offers the option to allow exporting all returned rows to Excel regardless of how many pages of results there are per TDO # 167862. There will no longer be a need to export page by page. 'Project Manager' from the Job's Working Budget has also been added to the utility's criteria and results. The ability to assign Job Episodes to transactions from the Utility has also been added. Reclassing will now create a reversal transaction in the original Order. This will only contain the actions that are being reclassified, so that the original transaction may remain intact. [6875 / tdo167279]

Update Billing Unit No Base Unit of Measure When Actualizing Trx

The 'Update Billing Unit when Actualizing' option on Billing Codes can now be set to 'Yes' when Unit Type's Base Unit of Measure is 'none'. [6881 / tdo167011]

Category & Episode Defaults

A default Episode and Category can now be defined on a Job. When present, these values will default for all Order transactions and Bid Details made on that Job. Module defaults are available to automatically create and set defaults when a Job is created.

Prerequisites: Features for Episodes and Budget Types linking Bids to Order Transactions must be configured and active. [6897 / tdo169708]

Enhance Actualize by Action Template Functionality

The Actualize by Action Template option has been enhanced to optionally allow setting the Action detail Unit from the Transaction Billing Unit. [6898 / tdo168367]

Billing Unit & Cost Unit Locks

Billing Unit and Cost Unit locks have been added to Order Transactions. Like the existing Rate, Discount and Markup locks, when these are active no changes can be made to the Unit, which includes changes made by other documents such as Media/Transmission Order – Service Rows, sources, etc. – Time Card, Purchase Order, etc. The purpose of these locks is to 'set' the Billing and/or Cost Unit values while still allowing changes to the Order or other documents to occur. [6939 / tdo162372]



Long Term Planning

Add checkbox to indicate Violations on Plan Scenario Entities

Adds a checkbox to the Plan Scenario Entities on the Plan results indicating there is a planning violation on the particular entity. [7053 / tdo170846]

Identify which Groups do not have named Resources when Scenario is applied and Bid approved

Implements the ability to generate work orders that ignore the planned resource on those groups for which the named resource is not relevant at the time the work order is created. [7054 / tdo170847]

Configure Group and Resource Capacity by Day of the Week

The ability to control capacity differently by the day of the week has been added so that the system accurately reflect available capacity to the Scenario Planning engine and Capacity and Demand Reports.

Configuration:

Need to add new fields (Capacity Hours Sunday - Saturday) to a custom group and resource document layout for testing.

New fields (Capacity Hours Sunday - Saturday) of existing groups and resources are populated by the update script if existing fields 'Days of Week' and 'Hours / Day' have values. E.g. Days of Week = 1,2,3,4,5 and Hours / Day = 8, then Capacity Hours Monday - Friday are set to 8.;For configuration, refer to story #2917. [7521]

Media Assets

Search Lists: Computed Columns for Child Value

It is now possible to create a computed column via Document Customizations to define columns in the results of search lists that pull singular data from a child table. A primary example of this would be to create five separate columns in Media Assets Search, each showing the 'Language' value from each of the first five audio channels for an Asset.

Configuration: In document customization, columns must be configured correctly, and then added to a custom layout of MetaVault Search.

Note: GetDisplayValue function name is not case sensitive. Function only works on parent/child tables (e.g. Asset Titles / Asset Audio, Asset Title / Asset Text, Asset Title / Alt Barcodes). [15418]

Document Customization: Parent Title and Principal Title Overrides for Assets and Titles

Parent and Principal Title No values have been added in the Title tables within the Media Asset Search List. Using these fields, a site may create Document Customization overrides to pull values



from Parent and Principal titles onto a row in the search list. These would be the Parent and Principal of the Asset's Primary Title only.

Configuration: Document Customization required. [19249]

Media Order

Adapter for Automated Delivery of Files to/from Amazon S3

The MediaPulse API now supports calling Amazon Simple Storage Service (Amazon S3)[®] to either upload a subtitle file or download a proxy file and subtitle version. [6715 / tdo152999]

Adapter and UI changes for Automated Delivery of Files to/from Amazon S3

Enables users to send/receive files to Amazon S3 using http from the user's computer. [6722 / tdo151624]

STL File Validation Before Upload

A new validation process is required to read files and confirm if they are valid STL structure files. If the files are, the program should then read the program number and compare against the work order program number. This happens before the file is uploaded. [6723 / tdo165336]

Task Type: Link Sources for Orchestration Adapter

A 'Link Sources' Task Type has been created. When included under a Service Row, setting this kind of Operation to Ready will process the Auto Link Sources option in the Conditions, if checked.

Prerequisites: The Media Order module must be licensed and configured. [6731 / tdo158637]

Add 'Claim' Button to Operations List

Added 'Claim' and 'Unclaim' Actions to the Operations List. With the proper setup, this allows a user to conduct a search of 'unassigned' Operations to assign their own Resource. Claiming will also update the Operation/Transaction date/time to begin at the current moment then end based on the Operation's estimated hours or the service row dates. 'Unclaim'ing an operation list item returns it to the 'pool'. New options on Operation Tasks allow for: How/If the transaction start date is updated when its Operation is claimed. How/If the transaction end date is updated when its Operation is claimed. If the transaction end date is updated when an Operation is completed. Also, an additional setting to create actuals.

Prerequisites: The Scheduling and Media Order and/or Transmission modules must be licensed and configured. [6732 / tdo160364]

Add Resource to Estimated Hours Logic on Media Order Tasks

A new 'Task Speed' field has been made available for Resources within Groups. This speed value can be different for the same Resource when in different Groups. When defined and the



Group/Resource is assigned to an Operation in a Media Order, the Task Speed will be multiplied with existing factors to modify the Estimated Hours value.

Prerequisites: The Media Order and Scheduling modules must be licensed and configured. [6938 / tdo153714]

Adapter to Load Template from an Operation

A new 'Load Template' Task Type is available for Media Orders. Part of the setup is in the Provider to define a Service Template. When an Operation with this Task Type is set to Ready, the Service Template is appended to the current list, then Source links and GOTOs are set appropriately.

Prerequisites: The Media Order module must be licensed and configured. [9614 / tdo158475]

Rental

Option to Update Resource Division from Check In/Out Record

If a Resource is added to a Check In/Out record has a different Division, a message is displayed to the user allowing them to update the Resource Division to match the Check In/Out record. [6595 / tdo161326]

Schedule Book

Schedule Book Scheduling View from Transmission Order (Show on Calendar)

The Show Schedule Book action inside a Work Order now launches a Schedule Book view of the resources in the Order.

Prerequisites:

- The Scheduling module must be licensed and enabled.
- The user must have the 'View Order in Schedule Book' rights code enabled in the Jobs Management document.

[10670]

Add 'Go to Now' Action Button or Timeline Navigation Click to Schedule Book

In the Schedule Book, the 'Today' link in the header changes to a 'Now' link when the visible timespan is 24 hours or less. Selecting this link makes current time the left most time displayed in the view. [11455]

Scheduled Reports

Add Trx Date Range as Criteria to Job Calendar Report



'Trx Date Range' criteria has been added to the Scheduling module's Job Calendar Report. This new date range can be used instead of the existing Order Date Range (reabeled) to show data in cells only if a Transaction begins on that date. [6877 / tdo167626]

Add Trx Phase as Criteria to Job Calendar Report

An option for 'Trx Phase(s)' has been added to the Criteria options for the Job Calendar (SchJobCalendarReport, doc ID 1345) report.

- Criterion is a multi-select drop-down list of Phases. None Phase Type 'Void'.
- The default value is blank.
- Enabled only if the Trx Date Range option has values.
- When selected, cells only return data for Orders with Transaction(s) in the selected Phases.

[6853 / tdo168324]

System

Sched By User Rights

'Sched By' rights have been added to the User Profile. Like Customer, Vendor and Job Rights, this allows the User to be limited to view or edit records where the Sched By has been defined for them. 'Sched By' is a field that is set by default on Bids, Bid Collections and Orders to the user that created the record. It can be manually changed to another user. Sched By rights allow a user to be setup to see/edit their 'own' records as well as a select group of other users.

Prerequisites: The Job Management module must be licensed and configured. [6892 / tdo156998]

Transmission

Origin and Destination Location(s) - Location Points

Transmission 'Points' have existed in Transmission Orders. The definition of points has been expanded to define more attributes such as Country, State, City, Longitude and Latitude. These values can now be displayed in Transmission Order screens and reports. Future use will include the ability to translate data to third-party applications like mapping apps.

Configuration:

Transmission 'Points' have existed in Transmission Orders. The definition of points has been expanded to define more attributes such as Country, State, City, Longitude and Latitude. These values can now be displayed in Transmission Order screens and reports. Future use will include the ability to translate data to third-party applications like mapping apps. [11623]

Limit Future Bookings



In the Schedule Book, the visual indicator for a limitation on booking into the future is now also displayed on the date selection calendar used to navigate to a different date or time, and on the calendars in the Duplicate screen used to copy scheduled items. EUTUK [16344]

Users

User Search Row Display Options

In the User Profile, 'Sky Page Size' has been relabeled as 'Max Web Rows'. In this field, an administrator can define the rows returned for a user in a search list. 'Max Select Result' has been hidden from the document. The value only applies in the smart client, which should only be used for administrative functions as of version 11. 'Sky Page Size Mobile' has also been hidden from the document as the mobile app that it was created for is no longer in use. The 'Max Web Rows' value now limits the 'Maximum number of rows to display in a search' field in the user's Options window. The field in the Options window cannot be more than the 'Max Web Rows' value defined by the administrator but it can be lower. The field cannot be lower than 50, which is the system's minimum value. The label of the field has been changed to 'Number of rows displayed in a search (between 50 and xx)', where 'xx' is the 'Max Web Rows' value from the user's profile. If the user clears the field's value, the 'Max Web Rows' is applied. If the administrator changes the 'Max Web Rows' value to something less than the user's Options value, the user's Option value will be cleared. [15417]

Vendors

Vendor Portal - Vendor Security and Vendor Portal - Part 2

(Part 2 of 3) This specification includes restrictions and security for Vendor users: i.e. the 'Vendor Portal'. Users will be able to:

- Create a Vendor User/Login.
- Login as a Vendor to access Quotes search and Quote maintenance along with linked Job.
- As a Vendor, edit Quotes, change Statuses. Restrictions should apply.

Prerequisites: The Job Management module must be licensed and configured. [9612 / tdo164752]

Work Orders

Refresh Rate Options & Actions

The Assign Job action for Orders has been modified. The window and the actions to open it have been relabeled 'Assign/Remove Job'. The Reset Rate option has been changed from a checkbox to a drop-down list with values for resetting all rates, only resetting non-manual rates or not resetting any rates. The 'Remove Job' action has been removed as redundant. [18643]

New Option to Not Refresh Rates on Order Transactions or Working Budget



A new option has been added in various places when a user is asked if rates should be refreshed for order transactions or bid/budget detail. The existing questions occurred if something changed -- namely dates or Rate Card -- and the user must decide if rates should remain the same or if all rates except those manually edited -- i.e. 'manual rates' -- should be refreshed. In both cases, non-manually edited rates were always refreshed. The new option allows the user to keep all existing rates. Meaning, if a rate was \$100 it would remain \$100 after the change, no matter the new values that might otherwise cause the rate to be updated. The new option is also present in the duplicate functions for order transactions, orders, jobs and bids. [18646]

Resolved Issues

APIs & Integration

POST Call Not Populating "Dropdown/standard reference" Field

Resolves an issue where populating a custom field type "Dropdown/standard reference" failed to populate the description value. [18384 / zd5084]

Monitors Outbound System Service to Update to Not Use Fingerprint

Resolves an issue to allow the Monitors adapter to bypass SFTP fingerprint verification. [19837 / zd6596]

Resource Location Table Accented Characters API Error Multiple Values

Resolves an issue where certain API calls failed to properly handle accented characters. [20437 / zd7221]

Fix patch call for Setup documents primary table

Resolves an issue with the ability to PATCH setup documents by following the Swagger definition. The undocumented workaround of appending the sub-table and another key/value pair is still functional where integrations have used that approach. [21206 / zd7605]

Error on Title Sessions update when using API call

Resolves a SOAP API issue relating to updating a Session for a Title using the upsert method. [21950 / zd8266]

Posting NULL on last_move_date field through API results in 1/1/0001 12:00:00 AM Date when Accessed through SQL

Resolves a REST API issue where setting a date field to null would set its value to "0001-01-01T00:00:00". Now date fields can be set to null values where permitted. [22132 / zd6762]

SOAP API - MO not creating for OrderType - Auto Varispeed (Auto Time Compression)



Resolves an issue where loading certain Service Templates via the API would result in the order failing to be created due to a warning message being thrown as a business exception. [22740 / zd8413]

Bandwidth Planning

Unable to resolve conflict by selecting different Resource in a different Group

Resolves an error that would occur when moving a booking to another Group from the Conflicts window. [19178 / zd5490]

Dynamic booking parameters Keep Bandwidth and Optimize ignored when offset is changed via grid update in Order Transactions List

Resolves an issue where Bandwidth Offset values were editable via Grid Update on the Order Transactions list, despite being configured to keep parameters. [19291 / zd5878]

Bids and Budgets

Load Rate From Source in Bid Detail Search (LA-Media)

Resolves an issue where the option Load Rate from Source did not work when initiated from the Bid Detail search window. [19835 / zd6582]

Actual Amount Column on Budget Detail Search Shows Total Bid Detail Actual Amount Not Individual Budget Detail Actual Amount

Resolves an issue on a Bid document where the actual amount for each row displayed the entire Bid Details Actual Amount, not the Actual for each individual Budget Detail row/period. [20457 / zd7256] [20457 / zd7256]

Auto Load Actuals Failed

Resolves an issue where Actual numbers in a Working Budget were not updating after auto loading actuals for an approved Bid. [21837 / zd8133]

Question: Why are some billing units in bid details of a budget in red text while others aren't?

Resolves an issue where some billing unit values on Budget Bid Details were incorrectly colored red. [22483 / zd8809]

AICE Report Does Not Display Actual Amount from Bid

Resolves an issue where the AICE Report wasn't displaying actual amounts properly. [22488 / zd8774]

Running Bid Job Comparison Report Throws Error



Resolves an error running the Bid Job Comparison report. [22523 / zd8826]

Bid Job Comparison Report Displays Inaccurate Results

Resolves an issue with comparison results in this report after the upgrade to version 11.0. [23140 / zd9498]

Bid Approve from Lists Does Not Set to Change Request Queue as needed

Resolves an issue when a Bid/Budget is approved from the Bids search list but the Change Template validation was not triggered. [23153 / zd9499]

Billing / Invoicing

Rate Descriptions on Billing Transactions not being pulled in after flipping Rate Card on MO

Resolves an issue with Rate Set Descriptions if a Rate Card is changed and then changed back. If a Rate Set is set on a transaction and the Rate Card is changed, if a new Rate Set can't be found the transaction is cleared correctly -- meaning the Rate Set is neither on the new Rate Card or on the Standard Rate Card. The error occurred if the original Rate Card was reinstated and the Rate Set could not be set because the transaction was now cleared. Now, it is set properly. [22097 / zd4281]

Billing Rate OOP checkbox did not come over with upgrade to v11

Resolves an issue on upgrade where a new field (Out of Pocket, on Bid Detail) was not getting set properly for all Billing Codes. [22556 / zd8865]

Unable to Unpost Invoice Batch

Resolves an issue where certain Invoice Batches were unable to be unposted after an upgrade. [23244 / zd9636]

Contacts

Error message when Assigning Vendor Profile to a Contact

Resolves an issue where the system displayed a vague error when adding a vendor Profile to a Contact if the Default Vendor ID in AP Preferences was not populated. The system now displays a more helpful error message. [20550 / zd7224]

Document Customizations

Dropdown custom Multiselect Values display as IDs when using Microsoft® Excel® export from Work Orders Document

Resolves an issue where Document Customization Multi-select Dropdown fields would show as id key values instead of descriptive text when exporting the data to Microsoft Excel. [20564 / zd7326]



Add WO Type to Service Search

Resolves an issue where the Work Order Type was unavailable in the Service Search application. [20707 / zd7449]

Reference Doc Fields is not enabled for Order No.

Resolves an issue where the Reference Doc Fields dropdown was not enabled for (Transmission) Order No in Document Customizations. [21276 / zd7666]

Linked Dropdowns Broken after Upgrading Environment from 10.4 to 10.6

Resolves an issue where Linked Dropdowns did not properly filter. [22726 / zd8961]

Event Triggers

Event Trigger Sends Original Order Type Description After Making Changes

Resolves an issue where a configured Event Trigger would send the previous Order Type Description instead of the new one after changing the order type. [18958 / zd5531]

Framework – UX

Sort Arrow Appears Over Date Parameter Box With Grouping Off

Resolves an issue by improving controls within search bar filters. [10197 / tdo173672]

'Date to' Field Overlapped Grouped Column's Parameter

Resolves an issue by improving controls within search bar filters. [20220 / zd6474]

Schedule Book Fails to Auto-Refresh

Resolves an issue with a memory leak brought on by SKY_BROADCAST_BOOKING_CHANGES=Y when terminated sessions exist. [21379 / zd7769]

Import Utilities

Resources not adding to Scheduling Groups when Importing Records from Spreadsheet

Resolves an issue where resources added when importing records from a spreadsheet were not added to the appropriate scheduling group. [21478 / zd7788]

Job

Default Booking Type Option from Select Order on Job > Order Tab



Resolves an issue where Named values would show a number instead of the description of the first choice in the list. [19688 / zd6494]

Issue with Duplicating WO's inside a Job: System is not Automatically Refreshing the Order after the Conflict is Resolved by the User

Resolves an issue when duplicating a Work Order from within a Job where the order list would not refresh after resolving conflicts. [19967 / zd6660]

Exporting to Microsoft Excel from Search, Exports all Division Records even if User Doesn't Have Access

Resolves an issue where exporting records to Excel from a search would ignore division security restrictions and export records from all divisions, not just the divisions to which the user has permissions. [20128 / zd6894]

Invoice Forms, Notes are No Longer Printing

Resolves an issue where invoice forms failed to print invoice notes. [20571 / zd6962]

Rate on Trx resets for Non Actualized Transactions when you Update Episode/Category using Action

Resolves an issue where rates on transactions for non-actualized transactions would reset upon updating the Episode or Category via the action menu. [22584 / zd8951]

Login & Access

SAML Log In Does Not Hide Username and Password Fields

Resolves an issue where the SAML login page failed to hide the Username and Password fields. [22301 / zd8487]

Media Assets

Action Add Assets Unavailable to Non-Super Users When Asset Division filled in Non-Division Database

Resolves an issue where non-super users were unable to add Media Assets to the MetaVault Library when Divisions were NOT in use. [19626 / zd6339]

Media Order

Linking MO Sources jumps Source section to bottom (to the Source Target)

Resolves an issue where Linking a Media Order Source to a Service scrolls to the new source Target. [18320 / zd4976]



Target Source Attributes Set From Input Source and not From Service

Resolves an issue where Target Source attribute values were being set from the original Source attributes instead of the service attributes. [18333 / zd5058]

Error when Duplicating any Order

Resolves an issue where duplicating an order would fail after upgrade due to missing link type configuration. [19970 / zd6705]

Completing Operation on one Service Row also Completes Operation on another Service Row

Resolves an issue where completing an operation on a Media Order Service row would also complete an operation on another service row. [20204 / zd5456]

Linking MO Sources jumps Source section to bottom (to the Source Target)

Resolves an issue where linking a Media Order Source to a service causes the source select to jump to the bottom of the sources list where the Source Target is added. [21278 / zd4976]

Service not created when adding Resource with Default Service Order from Schedule Book

Resolves an issue where a Service would not be created when adding a Resource to an existing Media Order or Transmission Order by first selecting a booking from the schedule book and then selecting a Resource, when the Resource is set up with a default Service / Profile and Task. [21479 / zd7801]

Resource not assigned to Service when Multiple Resource with same Default Service from Schedule Book

Resolves an issue where the Resource was not assigned beyond the first Service when adding multiple Resources with same default Service to a new Media Order or Transmission Order from the Schedule Book. [21482 / zd7828]

Rate Descriptions on Billing Transactions not being pulled in after flipping Rate Card on MO

Resolves an issue with Rate Set Descriptions if a Rate Card is changed and then changed back. If a Rate Set is set on a transaction and the Rate Card is changed, if a new Rate Set can't be found the transaction is cleared correctly -- meaning the Rate Set is neither on the new Rate Card or on the Standard Rate Card. The error occurred if the original Rate Card was reinstated and the Rate Set could not be set because the transaction was now cleared. Now, it is set properly. [22097 / zd4281]

Changing the Job from the MO versus MO Grid Update

Resolves an issue where changing the Job from the Media Order maintenance window versus the Media Order List via Grid update resulted in different results. [22149 / zd4885]

'An Internal Error has Occurred' when Launching Report



Resolves an issue where reports based on the Media Order Service Search list resulted in an internal error. [22310 / zd8421]

Cancel Reason Unavailable When Cancelling Service Row

Resolves an issue where Cancel Reasons and related fields were disabled after canceling a Service Row. [22340 / zd8641]

MO Service Search - Rapid Update Internal Error

Resolves an error that would occur when doing a Rapid Update on Media Order Services from the MO Service Search. [22341 / zd8644]

Incorrect Syntax Error When Performing Asset Selection - Search/Add Assets Action

Resolves an 'Incorrect Syntax' error when performing Media Asset selection from within a Media Order using the 'Search/Add Assets' action. [22362 / zd8311]

Slow Performance Deleting Sources/Assets from Distribution Media Orders

Resolves an issue where performance was slow when deleting Sources/Assets from Media Orders. [22364 / zd8396]

Changing Media Order End Date resets PO Cost

Resolves an issue where amending the Order End date time using Change order only or Adjust option on a Purchase Order created from a Media Order with a manually entered Cost on the PO would clear out the Cost on both the Transaction and the Purchase Order. [22473 / zd8283]

Lost Connection when specific Media Order is amended

Resolves an error with a circular reference that didn't allow certain Media Orders to save. [22516 / zd8858]

Media Order Billing Issues - Billing Code set on Spec not creating Billing Transactions

Resolves a billing issue that occurred on Media Order Service rows on orders set to an order Rate Card other than the Standard Rate Card, when the Billing Code field is populated on a Profile Spec in the Media Order Services setup, and the Resolve BC field for the Profile is set to 'Resolve - Normal.' [22612 / zd8850]

Personnel Rules

Difference Between Entitlement TOIL Taken and TOIL Rostered

Resolves an issue where TOIL Time Off was being applied/linked to the same Entitlement twice, resulting in the Entitlement TOIL Taken not matching the hours of the TOIL Rosters. [15851 / zd3127]



Project Management

Some actions do not execute properly in Project window and Project Activity Search grid

Resolves an issue where clicking the blank area at the bottom of a tree grid control, such as the Activities list in a Project or the Services list in a Media Order, reset a recently modified record to its previous values. [21560 / zd7737]

Purchase Order

Changing Media Order End Date resets PO Cost

Resolves an issue where amending the Order End date time using Change order only or Adjust option on a Purchase Order created from a Media Order with a manually entered Cost on the PO would clear out the Cost on both the Transaction and the Purchase Order. [22473 / zd8283]

Resources

Qualification End Date doesn't Filter the Qualified Resources

Resolves an issue where Qualification End Date was not filtering out Resources with expired Qualifications using Advanced Resource Selection. [22110 / zd8308]

Roster / Time Off

Expression Error on Scheduling Resource Layout when using TRX Table 1 Fields on Roster Time Off Document

Resolves an error that would occur when using fields from 'TRX Table 1' as part of a computed column within the Roster Time Off document, when opening the Scheduling Resource layout. [20069 / zd6504]

Schedule Book

Rosters Overlapping Two Days in Schedule Book After DST Date

Resolves an issue that would occur in a time zone database where rosters were being offset by 1 hour when users in GMT were looking at Rosters beyond the date of March 26th (Daylight Savings Time). [8245 / tdo172859]

Schedule Book Items Resource Lookup List Incorrectly Allows Multiselect (Cannot Apply Selection)

Resolves an issue when searching for Resources in Schedule Book > Items where the ability to multi-select Resources gave the impression that multiple rows could be applied, which is not the case, as only one Resource may be applied per Items row. [16317 / zd3692]

Fake conflicts showing on some resources in Schedule Book



Resolves an issue where the Conflict checkbox was checked in Scheduling Transactions for some Resources when there was no conflict. [18999 / zd5700]

Print View From Schedule Book Starts on Previous Day

Resolves an issue where Schedule Book Report sometimes started on the date prior to the left-most cell of the visible Schedule Book view; the report now always starts at the specified date. [20463 / zd6944]

Non-Scheduled Workers show when Show Scheduled Resources Option is Enabled

Resolves an issue where the Schedule Book was set to show scheduled resources only, but displayed Resource rows when the Resources were not booked during the time range set. [20527 / zd7116]

The 'Notes' information from work order transaction missing from Exchange Notifications

Resolves an issue where tags for note fields were not including the actual note in Exchange Calendar Integration E-mails. [20585 / zd6159]

Edits to Transactions causes a refresh to bookings on Schedule Book

Resolves an issue where a user was interrupted from performing an action by the screen refreshing. Schedule Book will no longer refresh while a user is performing an action, such as editing a booking, quick hold, or roster, or in any other non-idle state. [21446 / zd7651]

Duplicating Roster Across DST Shifts Timeframe

Resolves an issue that would occur when duplicating a Roster from November 2nd to November 3rd, and the timeframe was shifting back one hour due to the Daylight Savings time change. [21658 / zd7922]

Schedule Book Internal Error when deleting & adding a new Resource without Saving

Resolves an error that would occur specifically after deleting an order transaction, and then immediately appending a new one, then clicking the Resource lookup. [22904 / zd9212]

Services & Utilities

Kronos Outbound System Service Throws Authentication Error

Resolves an issue where the Kronos Outbound System Service returned an authentication error. [19393 / zd4795]

Time Card

Time Card Load Schedule Does Not Retrieve Roster Time Off



Resolves an issue where Time Card Load Schedule did not always retrieve Roster Time Offs. [23237 / zd9388]

Titles

MetaVault Library - Error Message when Opening Child/Parent Titles option on Actions Menu

Resolves an issue when selecting 'Child Titles' on a Title. [19828 / zd5897]

Target Length Checkbox Not Functioning Correctly

Resolves an issue where the Target Length checkbox was not functioning correctly in a Media Order. [21282 / zd7418] [21282 / zd7418]

Titles Search Using |CURRENTLISTID| Not Working

Resolves an issue where entering the token |CURRENTLISTID| on a lookup would launch a lookup search instead of accepting the token. [22316 / zd8393]

Transmission

Amending UTC Start Time between 2300 and 2359 Shifts Air Begin Date by 1 Day

Resolves an issue when a user on UTC+0100 updated the UTC start time on a Transmission Order between 2300 and 2359, and the Air Begin Date unexpectedly shifted by 1 day. [18614 / zd5264]

Circular Reference when Deleting and Adding from Visualizer #2

Resolves a Circular Reference error that would sometimes occur in the Visual Path when unlinking Services on Transmission Orders. [19924 / zd6488]

Error when Duplicating any Order

Resolves an issue where duplicating an order would fail after upgrade due to missing link type configuration. [19970 / zd6705]

Loading Transmission Service Template from the Transmission Orders List does not Display Conflict Window

Resolves an issue where loading a Transmission Service Templates from the Transmission Orders List failed to trigger the Conflict Check window. [20276 / zd6990]

Reference Doc Fields is not enabled for Order No.

Resolves an issue where the Reference Doc Fields dropdown was not enabled for (Transmission) Order No. in Document Customizations. [21276 / zd7666]

Service not created when adding Resource with Default Service Order from Schedule Book



Resolves an issue where a Service would not be created when adding a Resource to an existing Media Order or Transmission Order by first selecting a booking from the schedule book and then selecting a Resource, when the Resource is set up with a default Service / Profile and Task. [21479 / zd7801]

Resource not assigned to Service when Multiple Resource with same Default Service from Schedule Book

Resolves an issue where the Resource was not assigned beyond the first Service when adding multiple Resources with same default Service to a new Media Order or Transmission Order from the Schedule Book. [21482 / zd7828]

Error when Saving NEW XMIT Order created from SB on Resource with Default Service

Resolves an issue where a Media Order or Transmission Order could not be saved when an order was created from a Schedule Book Resource with a Default Service and Task, where the Group was not assigned to the Task. [21623 / zd7920]

Work Orders

Phase - Internal Complete and Unlock Order Action

Resolves an issue so that, for any type of order, the 'Unlock Order' action now works for the 'Internal Complete' Phase. [13838 / zd2126]

Group Resources List with Schedule Availability not Showing some Shifts and Orders

Resolves an issue where the Group Resources List would not show availability for some shifts and orders. [16829 / zd3766]

Custom Date fields Ignored when Creating WO Table Setup via API

Resolves an issue where custom date fields sent via an API Patch call would not update the custom field. [18683 / zd5343]

Error when Duplicating any Order

Resolves an issue where duplicating an order would fail after upgrade due to missing link type configuration. [19970 / zd6705]

Error Message When Adding Resources to a Transaction using Ellipsis

Resolves an issue where an error was returned after a user added a Resource to a Transaction using the 'More options' button on a work order. [20094 / zd6267] [20094 / zd6267]

Visibility Rules Ignored when based on a Custom Dropdown Field Value



Resolves an issue where visibility rules were ignored when the rule was based on a Document Customizations dropdown field. [21250 / zd7269]

Adding Transactions to new Work Order, add Highest Disp Seq to the Top instead of Bottom before Saving

Resolves an issue where adding transactions to a new work order would place the new row at the top of the list rather than the bottom. After save, the new row would then appear at the bottom of the list. [22537 / zd8866]

Duplicating Orders via Schedule Book Shifts Times (Time Zone)

Resolves an issue where some orders created using the Order Duplicate feature had incorrect Begin and End times. [22557 / zd8329]

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