



23.07 RELEASE NOTES

July 15, 2023

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Release information

Release Date: July 15, 2023

Release Version: 23.07

Introduction

This document describes the features and functionality of this release of FAMIS 360. Enhancements include User Interface and API enhancements.

After the deprecation of Internet Explorer in June 2022, we no longer support the browser for running FAMIS 360. We recommend using Microsoft Edge instead.

The features highlighted below are now available. For more information or to learn how your organization can start using these features, please contact our sales team at 800-774-7622 or contact your account executive.

User Interface Refresh

We provided new User Interfaces for the WO Financials pages to conform to the new Accruent UI standards. This page received a modernized look and feel, meets most WCAG (Web Content Accessibility Guidelines) 2.1 accessibility standards and various UI bugs have been fixed.

Improvements and issues fixed

Component	Summary	Reference #
Purchase Requisitions	We now allow the ability to delete approved material items from a Purchase Requisition (PR). Previously deleting a material item was only allowed if the item was NOT in an approved status. Now with the right permissions, you can delete an approved material item from a PR. Key Updates: - Introduced a new user security right called Delete Approved Material Items on PRs (Purchase Requisitions) - The flag can be accessed in Admin > User Security > Purchasing Security Rights - By default, the flag is set to off (false) in all systems - Users with the Buyer flag checked, and the new permission enabled can delete approved material items on a PR	56467

Component	Summary	Reference #
	- To delete an approved material item, users with the Delete Approved Material Items on PRs permission should click Edit next to the item and select the Delete hyperlink within the edit modal - A confirmation prompt with options to Delete or Cancel will appear upon selecting Delete Please note that the new functionality is disabled by default for all users and environments.	
API	Enhancements have been made to the Geolocation API's functionality for posting geolocation data to a property. Previously, the API required the presence of an Asset or Request in the payload, causing issues when updating latitude and longitude information directly through the UI. The associated AssetId and RequestId returned null values when querying the GET /geolocations endpoint for the property ID. This release resolves these issues and improves the process of updating geolocation data on properties. Notable changes include PATCH Geolocations now supporting direct updates of latitude and longitude on a PropertyID without requiring an Asset ID or Request ID. Multiple associations of latitude and longitude values with a Property ID are not allowed, except when linked to a Request ID or Asset ID associated with the property.	60236
API	We now allow the ability to delete approved material items from a Purchase Requisition (PR). Previously deleting a material item was only allowed if the item was NOT in an approved status. Now with the right permissions you can delete an approved material item from a PR. The Delete Approved Material Items on PRs security right has been added to the GET and PATCH endpoints of User security. Interaction with this security right requires the Purchasing Module to be enabled and the user to have the Advanced Inventory permission checked. The new functionality is additive and does not impact existing functionality in the UserSecurities endpoint.	60284
Purchase Orders	In the previous version, there was an issue where the Tax Rate text box remained editable even when selecting NonTaxable from the dropdown menu while creating a new Purchase Order (PO) in the Purchasing module. We have made a change to disable the Tax Rate text box when NonTaxable is selected during PO creation. This ensures that users cannot enter incorrect or unnecessary tax rate values. It is important	60244

Component	Summary	Reference #
	to note that this change only affects the Tax Rate text box and does not impact the calculation aspect of the tax rate functionality.	
Work Orders	Previously, there was an issue where a work order (WO) with an associated asset retained the asset even after the WO was reclassified to a different property. This violated the rule of aligning assets with the property of the WO. To ensure data integrity and accurate asset tracking, we have implemented a fix that disassociates the asset from the WO when reclassification occurs. This enhancement improves data accuracy and prevents the creation of incorrect asset history.	52653
API	We addressed an issue with the Property UDF API, ensuring the correct reflection of updated values and preventing the loss of drop-down UDF values on Spaces or Floors with migrated data. These improvements synchronize the values between the User Interface and API, eliminating confusion and maintaining data consistency.	54288
Find Request	We fixed an issue where accessing Find Requests and choosing a date range of last quarter, the end date reflected the previous year. The date range now reflects the correct quarter.	55822
Shopping Cart	To improve the visibility and management of shopping carts, we have implemented enhancements that allow users with Shopping Cart Rights to see all shopping carts, regardless of whether they have a work order associated with them. This eliminates the need for users to have Inventory Admin rights to view shopping carts without a request ID. These enhancements apply to both the user interface (UI) and the API.	58513
Security	To address inconsistencies in the behavior of the Locked Financial Security Right, we have implemented enhancements to improve workflow control when creating purchase orders (PO), purchase requisitions (PR), and shopping carts in relation to the status of the work order (WO). Previously, users were able to add lines to PRs even when the WO was closed. The resolution includes the following guidelines: If a user has the Update Locked Financial security right enabled, they can create a PO, PR, or shopping cart on a closed WO only if the Lock Financial request status is set to User Security.	58714

Component	Summary	Reference #
	- If a user does not have the Update Locked Financial security right enabled, they should not be able to create a PO, PR, or shopping cart on a closed WO when the Lock Financial request status is either Yes or User Security. - When closing a WO, any open PRs, POs, or shopping carts must be closed first, and users will receive a warning message prompting them to do so, unless the Allow WO Closure with open PO or Shopping Cart option is enabled. - Users are not allowed to create a PO, PR, or shopping cart with a closed WO ID in the Purchasing, Requisition, and Shopping Cart pages, and attempting to do so will result in a message instructing them to associate the items with an open work order request ID.	
Admin	This update addresses inconsistencies in admin rights assignment. Granting a user Asset and Inventory Admin rights no longer automatically includes Procedure and TimeCard Admin rights, aligning with the intended privileges assigned to users. As a result, users without System Admin or Timecard Admin rights will no longer see the Procedures (Knowledge) Admin or TimeCard TE Admin sections when accessing the Admin screen. The page security for TimeCard and Knowledge has been adjusted accordingly. This change ensures accurate admin rights assignment and eliminates unintended privileges. There is no impact on the existing functionality of FAMIS360.	60107
Timecard	As a continuation to handling inconsistencies in admin rights assignment, this fix ensures that if a user does not have security rights to the page, even if they try to get to it via bookmark, access is not granted, and they are taken back to the login screen.	60446
Work Order	You may again add attachments in the Work Order with drop and drag functionality.	60380
Work Orders	Fixed an error that occurred when adding a comment to a WO in a Closed status without Show Close Date user security permission. Now, you can update the WO status with the comments when Closed Date is unchecked.	60381
Create Request	Fixed an error where ampersand displayed as &amp; on the Create Request page.	60382

Component	Summary	Reference #
Copy Asset	We resolved an issue with the Copy Asset functionality in FAMIS360 related to the ECRI Codes Enabled flag. Attempting to copy an asset when the flag was set to Yes resulted in an error message. With the fix, you can now copy assets without encountering any errors, regardless of the ECRI Codes Enabled flag setting.	60385
Copy Asset	We resolved an issue related to the submission of Accounting Information on a Work Order. Previously, users on laptops were unable to scroll and fill out all the required Account Segments due to UI limitations. This improvement allows users to view and select all the available dropdown values, even when the number of options exceeds the visible portion of the window.	60387
Assets	We resolved an issue related to the encoding of asset names. Previously, the & character was incorrectly encoded as amp; and double quotes were converted into "" . This resulted in the display of unnecessary characters in asset names.	60388

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