



# **23.01 RELEASE NOTES**

January 21, 2023

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# Release information

**Release Version:** 23.01

**Release Date:** January 21, 2023

## Introduction

This document describes the features and functionality of the Siterra 23.01 release. Enhancements have been made for the following components: **Bulk Object Updater (BOU)**, **Documents/Library**, and **Payment Permissions**.

## Features and Enhancements

The following features and enhancements have been made in this release.

### BOU Extension: Subtask Completion

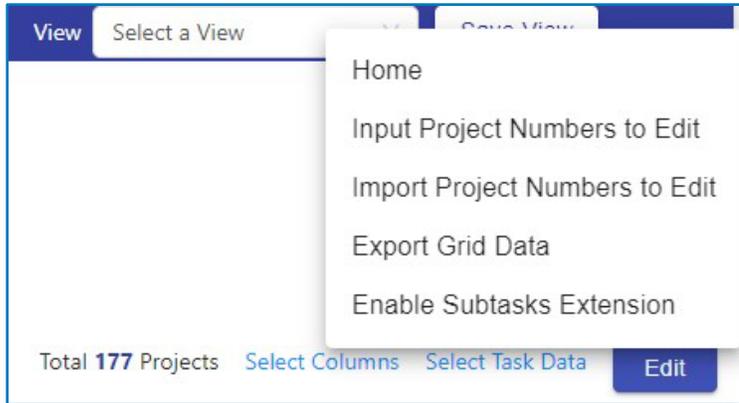
We are expanding **BOU** and have released the following extension for it: **Subtask Completion**. With this feature, users can now complete different types of subtasks – such as, forms, upload, and approval type – in bulk.

#### Note:

1. For editing, you can select only one subtask at a time. It is not possible to select any task in this flow.
2. When completing a form subtask, all business logics (mandatory fields) are bypassed.
3. It is not possible to use this extension to edit subtask attributes – such as forecast date, manual date, and lock. To edit these attributes, use the default **BOU** flow.
4. When form subtasks are completed, if there are form triggers or stored procedures, they will be triggered.

To enable this extension:

1. In **BOU**, click the ellipsis icon on upper right corner of the page.
2. Click **Enable Subtasks Extension**.



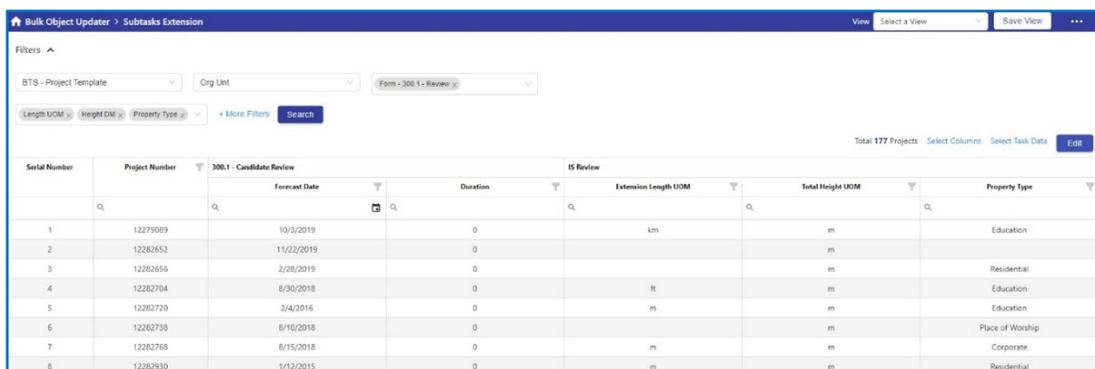
The subtask completion flow is activated.

3. To return to the default state, click **Home**.

## Single and Bulk Update of Form Subtasks

To edit form subtasks individually or in bulk:

1. In **Subtasks Extension**, select a template and organization unit.
2. In the tasks/subtask filters, select the subtasks you want to edit.  
To indicate the subtask type, all form subtasks have “Form” before their names.  
After selecting subtasks, the system fetches all project EAs from the form subtask in the EA filter.
3. Select all EAs you want to edit.
4. To narrow down the results, use additional filters.  
See the example below:



Serial Number	Project Number	300.1 - Candidate Review	IS Review	Extension Length UOM	Total Height UOM	Property Type
1	12279089	10/3/2019	0	km	m	Education
2	12282652	11/22/2019	0		m	
3	12282655	2/28/2019	0		m	Residential
4	12282704	8/30/2018	0	ft	m	Education
5	12282720	2/4/2016	0	m	m	Education
6	12282738	8/10/2018	0		m	Place of Worship
7	12282768	8/15/2018	0	m		Corporate
8	12282930	1/12/2015	0	m	m	Residential

5. To fetch projects, click **Search**.  
The grid shows all projects based on the selected filters.
6. To update or complete subtasks, click **Edit**.
7. In the edit mode, choose one of the following options.
  - To single edit a cell:
    - a. Click an extended attribute.
    - b. Make the desired changes. You can edit multiple cells in a similar way.  
To complete subtasks, click **Save & Complete**.

All selected subtasks are completed. If there are form triggers or stored procedures, they will be triggered.

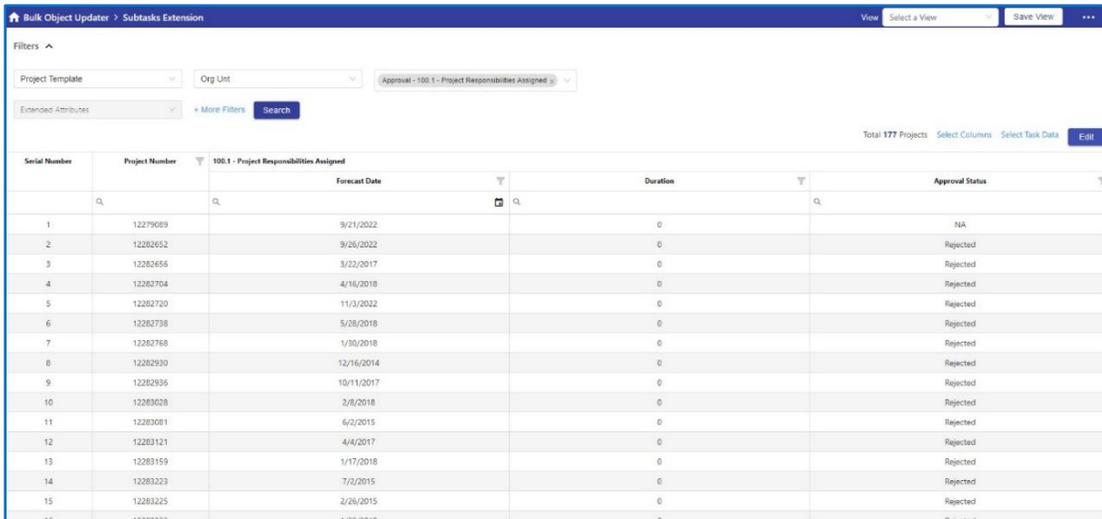
- To bulk update an extended attribute across projects:
  - a. Click the column header of the EA.  
A sidebar appears with an option to update the EA value.
  - b. Make the desired changes. You can update multiple columns in a similar way.  
To complete subtasks, click **Save & Complete**.  
All selected subtasks are completed. If there are form triggers or stored procedures, they will be triggered.

## Single and Bulk Update of Approval Subtasks

To edit approval subtasks individually or in bulk:

1. In **Subtasks Extension**, select a template and organization unit.
2. In the tasks/subtask filters, select the subtasks you want to edit.  
To indicate the subtask type, all form subtasks have “Approval” before their names.
3. To narrow down the results, use additional filters.

See the example below:



Serial Number	Project Number	100.1 - Project Responsibilities Assigned	Forecast Date	Duration	Approval Status
1	12279089		9/21/2022	0	NA
2	12282652		9/26/2022	0	Rejected
3	12282656		3/22/2017	0	Rejected
4	12282704		4/16/2018	0	Rejected
5	12282720		11/3/2022	0	Rejected
6	12282738		5/28/2018	0	Rejected
7	12282768		1/30/2018	0	Rejected
8	12282930		12/16/2014	0	Rejected
9	12282936		10/11/2017	0	Rejected
10	12283028		2/8/2018	0	Rejected
11	12283081		6/2/2015	0	Rejected
12	12283121		4/4/2017	0	Rejected
13	12283159		1/17/2018	0	Rejected
14	12283223		7/22/2015	0	Rejected
15	12283225		2/26/2015	0	Rejected

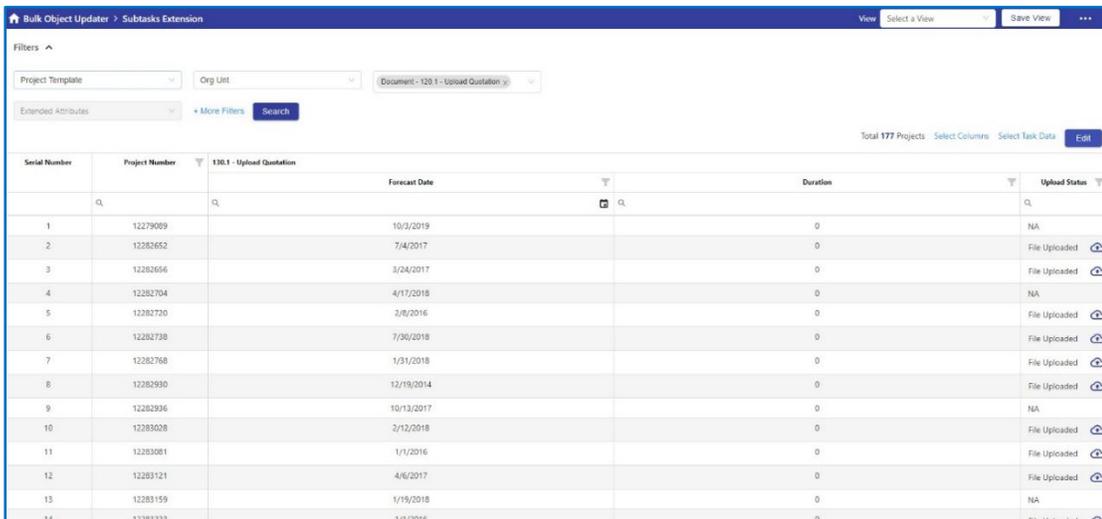
4. To fetch projects, click **Search**.  
The grid shows all projects based on the selected filters. The **Approval Status** column shows either **Approved**, **Pending**, **NA**, or **Rejected** for each project.
5. To update or complete subtasks, click **Edit**.
6. In the edit mode, choose one of the following options.
  - To single edit a cell:
    - a. Click an extended attribute.  
Select either **Approve** or **Reject** for a subtask.  
You can edit multiple cells in a similar way.
    - b. To complete subtasks, click **Save & Complete**.  
All selected subtasks are completed.

- To bulk update an approval subtask across projects:
  - a. Click the header.  
A sidebar appears with an option to update the approval status.
  - b. Make the desired changes.  
You can update multiple columns in a similar way.
  - c. To complete subtasks, click **Save & Complete**.  
All selected subtasks are completed.

## Single and Bulk Update of Upload Subtasks

To edit approval subtasks individually or in bulk:

1. In **Subtasks Extension**, select a template and organization unit.
2. In the tasks/subtask filters, select the upload/document subtask types.  
To indicate the subtask type, all upload subtasks will have “Document” before their names.  
Filters for Extended Attributes will be disabled.
3. To narrow down the results, use additional filters.  
See the example below:



Serial Number	Project Number	130.1 - Upload Quotation	Forecast Date	Duration	Upload Status
1	12279089		10/3/2019	0	NA
2	12282652		7/4/2017	0	File Uploaded
3	12282656		3/24/2017	0	File Uploaded
4	12282704		4/17/2018	0	NA
5	12282720		2/8/2016	0	File Uploaded
6	12282738		7/30/2018	0	File Uploaded
7	12282768		1/31/2018	0	File Uploaded
8	12282930		12/19/2014	0	File Uploaded
9	12282936		10/13/2017	0	NA
10	12283028		2/12/2018	0	File Uploaded
11	12283081		1/1/2016	0	File Uploaded
12	12283121		4/6/2017	0	File Uploaded
13	12283159		1/15/2018	0	NA
14	12283221		1/1/2016	0	File Uploaded

4. To fetch projects, click **Search**.  
The grid shows all projects based on the selected filters. The **Upload Status** column shows either **File Uploaded**, **NA**, or **Pending**.
5. To update or complete subtasks, click **Edit**.
6. In the edit mode, choose one of the following options.
  - To single edit a cell:
    - a. Click a cell.  
You can edit multiple cells in a similar way.
    - b. To upload a file, click **Upload**. Click **Browse** to upload files from your computer.
    - c. To complete subtasks, click **Save & Complete**.  
All selected subtasks are completed.

- To bulk update an upload subtask across projects:
  - a. Click the header.  
An upload window opens.
  - b. Browse for a file and upload it. You can also drag and drop the file you want to upload.  
You can update multiple columns in a similar way.
  - c. To complete subtasks, click **Save & Complete**.  
All selected subtasks are completed.

## Enhancements and Issues Resolved

Component	Reference	Summary
APIs	SP-49974	We fixed an issue where tasks created via API call were pulling the <b>Active Status Date</b> value from the template instead of referencing the true current information on the project.
BOU	SP-50573	Users can now view and add project notes across projects in <b>BOU</b> .
Customize Grids	SP-36028	We fixed an issue that caused the following error message to appear when trying to sort by <b>Affected Payments</b> on the offsets grid view:  "Internal server error: Failed retrieving data for grid #44040200"
Documents/Library	SP-49583	We fixed an issue where creating new categories or sections within a document library via the <b>Clipboard</b> option was causing the name of the <b>Category</b> or <b>Section</b> to be created with an odd value (%20) instead of a space.
Extended Attributes	SP-49143	We added a validation message that was missing for the <b>Maximum Length</b> parameter in EA for the <b>Text</b> and <b>Large text</b> field types.
External Links	SP-25723	We fixed an issue that caused the <b>Assemble Links</b> panel not to keep the order of the link sections.
External Links	SP-30702	We fixed an issue that caused the "&" character in section or panel titles to be saved as "&amp;".
Forms	SP-43578	We fixed an issue that caused the <b>Latitude/Longitude</b> fields to be visible without entering the data for the parent EA when the visibility dependency was set for these fields.

Component	Reference	Summary
Forms	SP-50441	We fixed an issue that prevented users saving a form from selecting, for example, the <b>No</b> value and saving the relevant form if an EA default value is <b>No</b> . The user would get a message stating that no changes have been made.
Forms	SP-50696	We fixed an issue that caused forms with a parent value containing a foreign character — such as “á”, “é”, “í”, “ó”, “ú”, or “ý” — not to be searchable.
Leases	SP-49640	We fixed an issue that prevented users editing payments from changing the <b>Phase</b> field back to <b>Not Selected</b> after selecting a value.
Leases - Escalations	SP-35600	We fixed an issue that caused a value entered in the <b>To Date</b> field for an escalation to remain even after clearing and saving the escalation.
Letter Manager	SP-49295	We fixed an issue where criteria selected in <b>Letter Manager</b> were not being saved, preventing the user to complete the configuration of the letter. Also, the action of saving changes in a package was changing the package set name.
Library	SP-49600	A new portfolio configuration can be enabled to allow only images from <b>Photo</b> libraries of an object to appear in the slideshow on the page of the object.
Login, SSO	SP-49992	We removed IE 11 from <b>Compatible Browsers</b> on the Login page.
Notifications	SP-36187	<p>We fixed an issue that could occur when editing the <b>Scope</b> setting in <b>Notification Subscriptions</b> for a task or subtask. This issue caused changes made to the <b>Scope</b> and shown in the <b>Summary</b> section not to be saved and applied after closing the window.</p> <p>Users should delete the existing subscription and create a new one with the same criteria and new units.</p>

Component	Reference	Summary
Payments	SP-47083	We fixed an issue that caused the consecutive <b>Planned Dates</b> to be calculated only on the 30 <sup>th</sup> if the <b>Second Payment Date</b> was scheduled in a 31-day month when the semi-annual recurring payments were set to a schedule of being due on the 30 <sup>th</sup> of each month.
Payments	SP-47335	We fixed an issue where users could create or edit payments with end date before start date.
Payments	SP-48342	We fixed an issue where only 30 days were being considered for payment calculation even for 31-day months.
Payments	SP-49410	We fixed an issue that allowed users with basic view permissions to view payment details from <b>Lease Quick Links</b> .
Payments	SP-49859	We fixed an issue that caused the <b>Reference No</b> field to accept up to 16 characters when editing One Time Payments, while it could accept up to 30 characters via import or via the <b>Payment Lines</b> section.
Payments	SP-50131	We removed <b>Pay</b> and <b>Hold/Release</b> from the <b>Update</b> permission and added new <b>Pay</b> and <b>Hold/Release</b> permissions under <b>Global Role Permissions</b> . This enhancement gives users more control over payment permissions.  Existing users who already have the <b>Update</b> permission will have <b>Pay</b> and <b>Hold/Release</b> permissions by default.
Project	SP-45722	We fixed an Issue where, under <b>Select Columns</b> , if <b>Additional Details</b> was selected, the <b>Additional Details</b> column was not appearing.
Responsibilities	SP-36983	We fixed an issue that prevented administrators from filtering inactive users in the <b>Defining Responsibility</b> menu, while it was possible to filter active and locked users.

Component	Reference	Summary
Tasks/Subtasks	SP-18860	We fixed an issue that caused an “Operation failed” message to appear when selecting a main task in <b>Mark Multiple NA</b> .
Tools	SP-49825	We fixed an issue that caused the <b>Archived By</b> column to show a number instead of a user name.
Uploads	SP-48858	We fixed an issue that caused non-image files to be accepted in the <b>Admin Portfolio</b> and caused the logo in the upper right corner not to appear.

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