

More4apps

Functional Impact Document

Event Wizard

Created By: More4apps

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Version: 6.0

Version Date: 26 May 2021

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Release 6.1.18 – 26/05/2021

The following includes details of the incremental fixes, functionality changes and or additions to the Event Wizard as part of its development and release process.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version, provided they were created in version 6.0.28 or later. We have implemented a new color scheme in the release 6.1.03 of the Wizard so whilst you **can** use your previous template/worksheets in this version, we recommend that your templates are updated to incorporate the new color scheme.

There are no functional changes in this version.

Release 6.1.06 – 28/09/2020

The following includes details of the incremental fixes, functionality changes and or additions to the Event Wizard as part of its development and release process.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version, provided they were created in version 6.0.28 or later. We have implemented a new color scheme in the previous version of the Wizard so whilst you **can** use your previous template/worksheets in this version, we recommend that your templates are updated to incorporate the new color scheme.

There are no functional changes in this version.



Release 6.1.03 – 28/05/2020

The following includes details of the incremental fixes, functionality changes and or additions to the Event Wizard as part of its development and release process.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version, provided they were created in version 6.0.28 or later. We have implemented a new color scheme in this version of the Wizard so whilst you **can** use your previous template/worksheets in this version, we recommend that your templates are updated to incorporate the new color scheme.

For information on the changes, please see below:

1.1. Added New Color Scheme

Version: 6.1.00

Date: 04/03/2020

New More4apps brand applied. This will have no functional impact on users and is purely a cosmetic update.

Existing templates with previous styles will work with this version, please note, however, the colors may change in these sheets when invoking Wizard functionality.

See below for an example:

Events															
Event Status	Event Message	Event ID	Upload Action	Project Name	Project Number	Task Name	Task Number	Agreement Number	Event Number	Event Reference	Event Type	Event Date	Organization	Description	Bill Amount
Default Values															
Error	API Error: PA_E	106234	Update	Professional	A101				1	M4A-760350	Manual	12/05/2018	Services-Eas	Manual TES	100
Accepted		109237	Create	Professional	A101	Business R	1.0		8	M4A-764173	Manual	12/10/2006	Services-Eas	Configuring	50000
Validated		49872		Professional	A101	Business R	1.0		1		Manual	12/10/2006	Services-Eas	Configuring	1000
Validated	No upload has	96978		Professional	A101	Business R	1.0		2	M4A-706414	Manual	3/05/2016	Services-Eas	Configuring	1000
		106232		Professional	A101	Business R	1.0		2	M4A-760341	Manual	3/05/2016	Services-Eas	Manual TES	1000

Release 6.0.42 – 10/09/2019



The following includes details of the incremental fixes, functionality changes and or additions to the Event Wizard as part of its development and release process.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version, provided they were created in version 6.0.28 or later. We have implemented a new color scheme in this version of the Wizard so whilst you **can** use your previous template/worksheets in this version, we recommend that your templates are updated to incorporate the new color scheme.

For information on the changes, please see below:

1.1. Added New Color Scheme

Version: 6.0.30

Date: 24/04/2019

More4Apps has implemented a new logo and color scheme, see below for an example:

BUDGET HEADER			Cost / Joint Cost & Revenue Plan Settings			Revenue Plan Settings				UPLOAD RESULTS			PROJECT		
Plan Type	Plan Setup	Version Type	Cost Level	Cost Time Phasing	Cost Resource List	Revenue Level	Revenue Time Phasing	Revenue Resource List	Version Name	Description	Change Reason	Upload Ok	Line Ok	Upload Error	Project Number
Approved Revenue	Revenue Only					Project	GL Period	Organization by Expen	Change Order	Additional scope and cost adjustm		Rejected		Revenue Res	Cost Plus
Capital Cost Bud	Cost Only		Project	GL Period	Organization by Expenditure Category				Change Order	Additional scope and cost adjustments					Cost Plus

No column names have been added or modified.

1.2. Ribbon Update

Version: 6.0.36

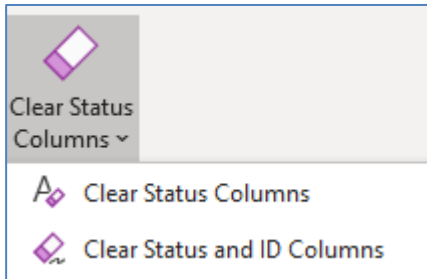
Date: 02/08/2019

Some ribbon icons have changed.

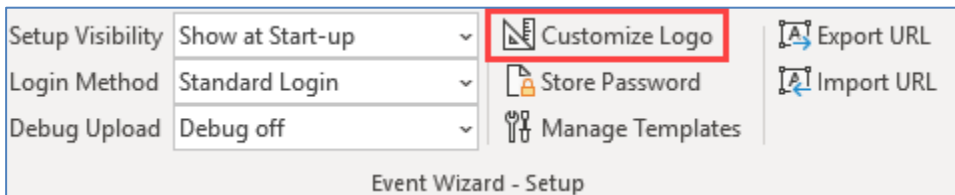
Clear Status Columns enables you to remove status column information from the worksheet. It now provides two options for selection:

- Clear Status Columns – This only clears the Status Columns and not the ID's.

- Clear Status and ID Columns – This clears the Status Columns and ID’s. This functionality is helpful if you have downloaded an existing record and would like to clear the ID’s to enable you to use this as a template to create a new record.
Note: If a Wizard does not have ID columns and this option is selected, a message will appear stating there are no ID columns, but all statuses have been cleared.



Renamed **Format Sheet** to **Customize Logo** under the **Event Wizard - Setup** ribbon. No changes to functionality.



Release 6.0.28 - 30/01/2019

This is a major release of Event Wizard which has significant changes and performance updates.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You **cannot** use your previous template/worksheets in this new version as the layout structure of the Wizard has changed with the addition of Upload Mode column and data layout changes.

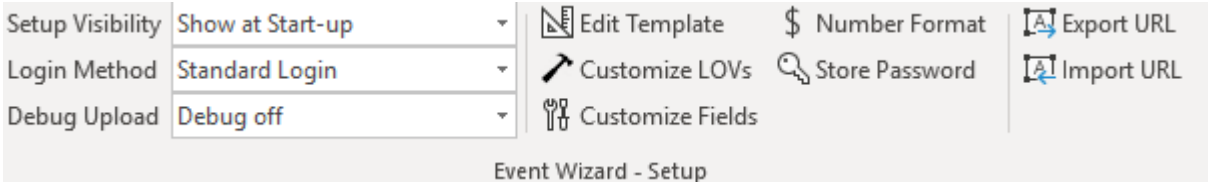
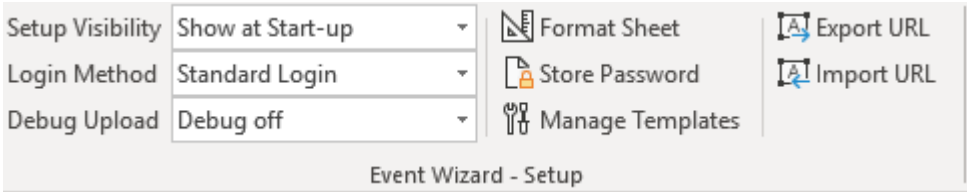


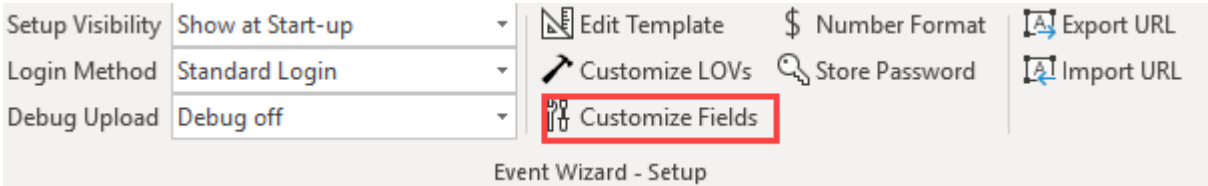
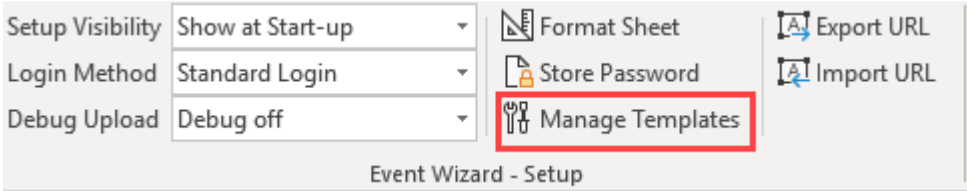
There are no specific Event Wizard packages required as all code is contained within the More4Apps workbook. The More4Apps servlet and shared packages are still required.

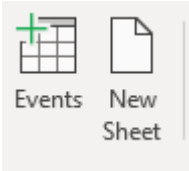
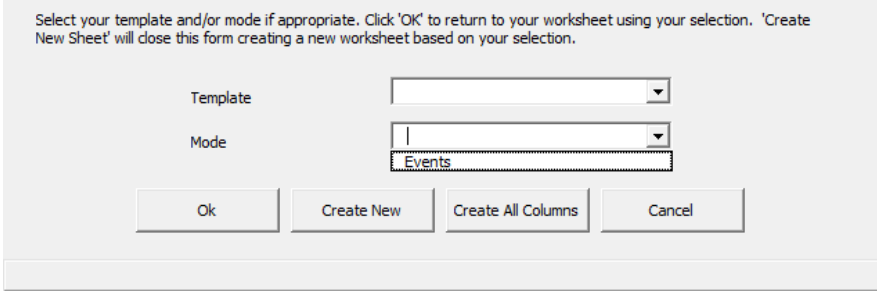
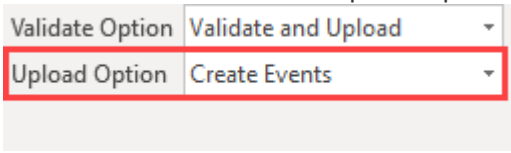
Details of changes are listed below:

Version	Date	Description																												
6.0.23	10-Jan-19	<p>Validation included on how Bill/Revenue Amount should be handled based on Event Type selected. Below is a list of Event Types and the validation that are associated with them.</p> <table border="1"> <thead> <tr> <th>Event Types</th> <th>Bill / Revenue Amount Field Behaviour</th> </tr> </thead> <tbody> <tr> <td>Base House Revenue</td> <td>Both fields can have any value</td> </tr> <tr> <td>Bonus</td> <td>Bill Amount copies Revenue Amount and gets disabled</td> </tr> <tr> <td>Cash Discount</td> <td>Both fields can have any value</td> </tr> <tr> <td>Customer Deposit</td> <td>Both fields can have any value</td> </tr> <tr> <td>Invoice Reduction</td> <td>Revenue Amount changes to zero and gets disabled</td> </tr> <tr> <td>Manual</td> <td>Both fields can have any value</td> </tr> <tr> <td>Milestone</td> <td>Revenue Amount changes to zero and gets disabled</td> </tr> <tr> <td>Option Revenue</td> <td>Both fields can have any value</td> </tr> <tr> <td>Payment</td> <td>Revenue Amount changes to zero and gets disabled</td> </tr> <tr> <td>Prebill</td> <td>Revenue Amount changes to zero and gets disabled</td> </tr> <tr> <td>Premium</td> <td>Both fields can have any value</td> </tr> <tr> <td>Retainer</td> <td>Revenue Amount changes to zero and gets disabled</td> </tr> <tr> <td>Write-Off</td> <td>Bill Amount changes to zero and gets disabled. Only Rev Amount can be updated</td> </tr> </tbody> </table> <p>The Wizard will give an error if you do not enter correct values corresponding to the Event Type and you will have to fix the values in order for the validation to pass.</p>	Event Types	Bill / Revenue Amount Field Behaviour	Base House Revenue	Both fields can have any value	Bonus	Bill Amount copies Revenue Amount and gets disabled	Cash Discount	Both fields can have any value	Customer Deposit	Both fields can have any value	Invoice Reduction	Revenue Amount changes to zero and gets disabled	Manual	Both fields can have any value	Milestone	Revenue Amount changes to zero and gets disabled	Option Revenue	Both fields can have any value	Payment	Revenue Amount changes to zero and gets disabled	Prebill	Revenue Amount changes to zero and gets disabled	Premium	Both fields can have any value	Retainer	Revenue Amount changes to zero and gets disabled	Write-Off	Bill Amount changes to zero and gets disabled. Only Rev Amount can be updated
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6.0.0	N/A	<p>Event Wizard ribbon change:</p> <p><i>Old</i></p> <p style="text-align: center;">vs.</p> <p><i>New</i></p> <p>Deleted:</p> <ul style="list-style-type: none"> • Edit Events standalone form icon • Edit DFF icon • Delete icon 																																																																																																																																																																																																																																																

Version	Date	Description
		<ul style="list-style-type: none"> Validate Option list of values Upload Option list of values Exclude Auto Events check box <p>Added:</p> <ul style="list-style-type: none"> Events Template List of Forms icon Normalization icon (not used for Event Wizard) Validate icon Logging icon Help icon <p>Event Wizard - Setup ribbon change:</p> <p><i>Old</i></p>  <p><i>New</i></p>  <p>Deleted:</p> <ul style="list-style-type: none"> Customize LOVs

Version	Date	Description
		<ul style="list-style-type: none"> • Customize Fields • Number Formats <p>Renamed:</p> <ul style="list-style-type: none"> • Edit Template to Format Sheet <p>New:</p> <ul style="list-style-type: none"> • Manage Templates
6.0.0	N/A	<p>'Customize Fields' is now replaced by Templating:</p> <p>Previous Wizard Ribbon Control to create user's worksheets:</p>  <p>New Wizard Ribbon Control to create user's worksheets:</p>  <p>The 'Manage Templates' gives the following advantages:</p>

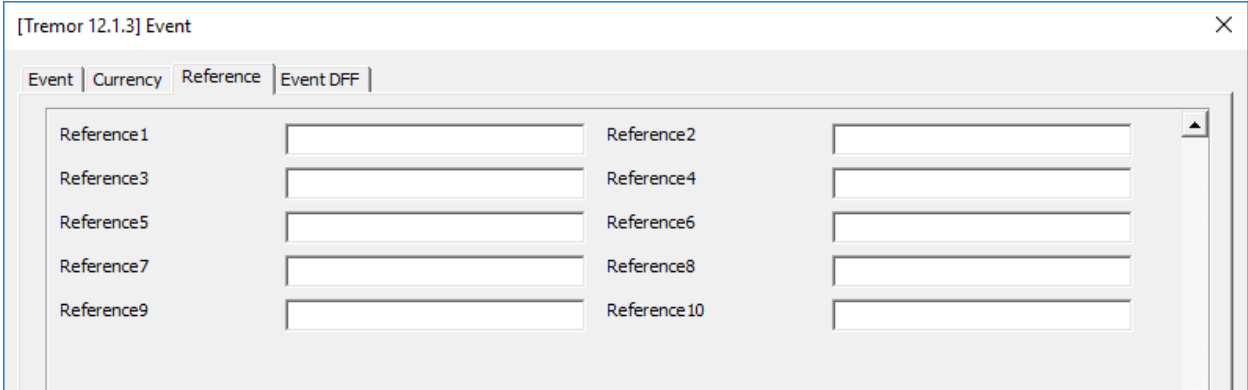
Version	Date	Description
		<ul style="list-style-type: none"> • Templates are stored on each instance and can simply be selected by the user in the main ribbon: <div data-bbox="524 336 712 507" data-label="Image">  </div> • Templates are secure, preventing users from accessing data they do not have permission to view or change. • Templates are easily copied from one instance to another. • Templates are optional, predefined modes can instead be used where users create their own layouts as appropriate.
6.0.0	N/A	<p>Wizard Mode must be selected after launching the Event Wizard for the first time. Template can also be selected from the drop-down box.</p> <div data-bbox="427 715 1301 1007" data-label="Image">  </div>
6.0.0	N/A	<p>The 'Upload Option' ribbon control has now been superseded by 'Upload Action' column in each section:</p> <p>Previous Wizard versions – Upload Option ribbon control:</p> <div data-bbox="427 1134 936 1286" data-label="Image">  </div> <p>New sectional 'Upload Action' column example:</p>


Version	Date	Description																																																
		<table border="1"> <thead> <tr> <th colspan="8">Event</th> </tr> <tr> <th>Upload Status</th> <th>Upload Message</th> <th>Event ID</th> <th>Upload Action</th> <th>Project Name</th> <th>Project Number</th> <th>Task Name</th> <th>Task Number</th> </tr> </thead> <tbody> <tr> <td colspan="8">Default Values</td> </tr> <tr> <td>Accepted</td> <td></td> <td>279993</td> <td>Create</td> <td>WT 20181205</td> <td>WT 20181205</td> <td>Planning</td> <td>1.0</td> </tr> <tr> <td>Accepted</td> <td></td> <td>279993</td> <td>Update</td> <td>WT 20181205</td> <td>WT 20181205</td> <td>Planning</td> <td>1.0</td> </tr> <tr> <td>Deleted</td> <td></td> <td>279993</td> <td>Delete</td> <td>WT 20181205</td> <td>WT 20181205</td> <td>Planning</td> <td>1.0</td> </tr> </tbody> </table> <p>Now users can perform create, delete and update action on the same upload as a single action. This gives the user ultimate control over whether the data is to be sent to EBS as new records or updates of existing records.</p> <p>There are 3 values available for Upload Action as explained below:</p> <ul style="list-style-type: none"> • Create – this will create new EBS records using the data in this Wizard layout section only. • Update – this will update existing EBS values for data in this Wizard layout section only. • Delete – this will delete existing EBS values for data in this Wizard layout section only. <p>Tip: Use the ‘Default Values’ row 10 data to populate this with the most commonly used type of upload you are running.</p>	Event								Upload Status	Upload Message	Event ID	Upload Action	Project Name	Project Number	Task Name	Task Number	Default Values								Accepted		279993	Create	WT 20181205	WT 20181205	Planning	1.0	Accepted		279993	Update	WT 20181205	WT 20181205	Planning	1.0	Deleted		279993	Delete	WT 20181205	WT 20181205	Planning	1.0
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6.0.0	N/A	Event Form <i>Old Form</i> <i>New Form</i>																																																

Version	Date	Description
		<div data-bbox="427 300 1070 1200"> <p>[Tremor 12.1.3] Event Wizard</p> <p>Event Currency</p> <p>Project: [dropdown] ...</p> <p>Task: [dropdown] ...</p> <p>Agreement Number: [dropdown] ...</p> <p>Event Number: [text]</p> <p>Event Type: [dropdown]</p> <p>Event Date: [calendar]</p> <p>Organization: [dropdown] ...</p> <p>Description: [text]</p> <p>Bill Amount: [text] <input type="checkbox"/> Adj Revenue Flag</p> <p>Revenue Amount: [text] <input type="checkbox"/> Rev Dist Flag <input type="checkbox"/> Billed Flag</p> <p>Billing Hold: <input type="radio"/> Once <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Ok Cancel</p> </div> <div data-bbox="1104 427 2112 1200"> <p>[Tremor 12.1.3] Event</p> <p>Event Currency Reference Event DFF</p> <p>Upload Action: [dropdown] Project Name: [dropdown] ...</p> <p>Project Number: [dropdown] ... Task Name: [dropdown] ...</p> <p>Task Number: [dropdown] ... Agreement Number: [dropdown]</p> <p>Event Number: [text] Event Type: [dropdown] ...</p> <p>Event Date: [calendar] Organization: [dropdown] ...</p> <p>Description: [text] Bill Amount: [text]</p> <p>Revenue Amount: [text] Adjusting Revenue: [dropdown]</p> <p>Bill Hold: [dropdown] Billed: [dropdown]</p> <p>Revenue Distributed: [dropdown] Quantity Billed: [text]</p> <p>Unit of Measure: [dropdown] Unit Price: [text]</p> <p>Row # 17</p> <p>Ok Cancel</p> </div>

New Form includes two new tabs:

- Reference
- Event DFF (this replaces the **Edit DFF** icon from the old ribbon)

Version	Date	Description
		<p>There are no more checkboxes or radio buttons available on the form.</p> <p>The new form includes new fields for user input:</p> <ul style="list-style-type: none"> • Quantity Billed • Unit of Measure • Unit Price • Bill Hold (default value is 'No') • Revenue Hold (setup dependent display field - default value is 'No') • Adjusting Revenue (default value is 'No')
6.0.0	N/A	<p>Reference fields can now be entered in the Event Form:</p>  <p>Event DFF fields can now be entered in the Event Form:</p>

Version	Date	Description
		
		Download form new design:

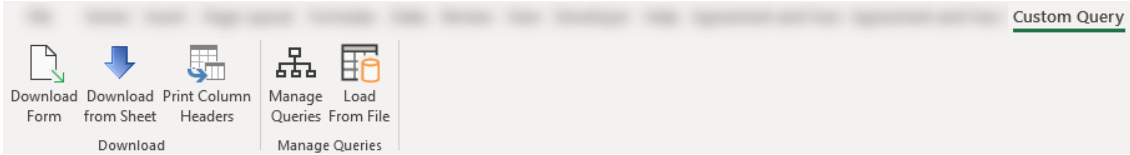
Version	Date	Description																						
		<div data-bbox="427 304 1742 1310" style="border: 1px solid #ccc; padding: 5px;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> × [Tremor 12.1.3] Download Form </div> <div style="padding: 5px;"> <p>Event </p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;">Project Name <input style="width: 90%;" type="text"/></td> <td style="width: 50%; padding: 5px;">Project Number <input style="width: 90%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Task Name <input style="width: 90%;" type="text"/></td> <td style="padding: 5px;">Task Number <input style="width: 90%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Organization <input style="width: 90%;" type="text"/></td> <td style="padding: 5px;">Event Type <input style="width: 90%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Event Number <input style="width: 90%;" type="text"/></td> <td style="padding: 5px;">Event Number To <input style="width: 90%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Creation Date <input style="width: 90%;" type="text"/></td> <td style="padding: 5px;">Creation Date To <input style="width: 90%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Event Date <input style="width: 90%;" type="text"/></td> <td style="padding: 5px;">Event Date To <input style="width: 90%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Revenue Amount <input style="width: 90%;" type="text"/></td> <td style="padding: 5px;">Revenue Amount To <input style="width: 90%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Billed Amount <input style="width: 90%;" type="text"/></td> <td style="padding: 5px;">Billed Amount To <input style="width: 90%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Revenue Distributed <input style="width: 90%;" type="text"/></td> <td style="padding: 5px;">Billed <input style="width: 90%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Billing Hold <input style="width: 90%;" type="text"/></td> <td style="padding: 5px;">Event ID <input style="width: 90%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Exclude Auto Events <input style="width: 90%;" type="text"/></td> <td></td> </tr> </table> </div> <div style="border-top: 1px solid #ccc; padding-top: 5px; margin-top: 10px;"> Row # 21 <div style="float: right; margin-right: 20px;"> <input type="button" value="Download"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/> </div> </div> </div>	Project Name <input style="width: 90%;" type="text"/>	Project Number <input style="width: 90%;" type="text"/>	Task Name <input style="width: 90%;" type="text"/>	Task Number <input style="width: 90%;" type="text"/>	Organization <input style="width: 90%;" type="text"/>	Event Type <input style="width: 90%;" type="text"/>	Event Number <input style="width: 90%;" type="text"/>	Event Number To <input style="width: 90%;" type="text"/>	Creation Date <input style="width: 90%;" type="text"/>	Creation Date To <input style="width: 90%;" type="text"/>	Event Date <input style="width: 90%;" type="text"/>	Event Date To <input style="width: 90%;" type="text"/>	Revenue Amount <input style="width: 90%;" type="text"/>	Revenue Amount To <input style="width: 90%;" type="text"/>	Billed Amount <input style="width: 90%;" type="text"/>	Billed Amount To <input style="width: 90%;" type="text"/>	Revenue Distributed <input style="width: 90%;" type="text"/>	Billed <input style="width: 90%;" type="text"/>	Billing Hold <input style="width: 90%;" type="text"/>	Event ID <input style="width: 90%;" type="text"/>	Exclude Auto Events <input style="width: 90%;" type="text"/>	
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There are no more checkboxes or radio buttons available on the form.

Release 5.5.45 - 02/11/2018

The following includes details of the incremental fixes, functionality changes and or additions to Event Wizard as part of its development and release process.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version. There is no change to the product package this new Wizard version.

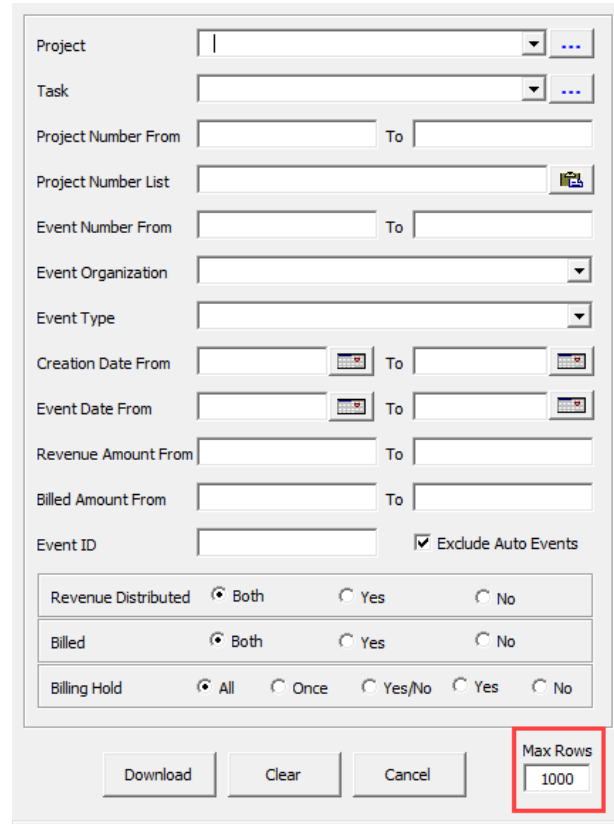
Version	Date	Description
5.5.30	04-09-2018	<p>Function Security</p> <p>Added functional security controls over downloading event details against a project. Users without Projects responsibility will not have access to view or make changes to events via the Event Wizard.</p>
5.5.19	12-02-2018	<p>Ribbon change</p> <p>Downloader ribbon name changed to Custom Query</p> 

5.5.28

03-09-2018

Download Form

Removed the Max Rows option from the Download form. The Wizard will no longer limit the number of lines downloaded to the sheet.



The screenshot shows a 'Download Form' window with various search and filter criteria. The criteria include:

- Project: [Dropdown]
- Task: [Dropdown]
- Project Number From: [Text] To: [Text]
- Project Number List: [Text] [Icon]
- Event Number From: [Text] To: [Text]
- Event Organization: [Dropdown]
- Event Type: [Dropdown]
- Creation Date From: [Text] [Calendar] To: [Text] [Calendar]
- Event Date From: [Text] [Calendar] To: [Text] [Calendar]
- Revenue Amount From: [Text] To: [Text]
- Billed Amount From: [Text] To: [Text]
- Event ID: [Text] Exclude Auto Events

Filter options:

- Revenue Distributed: Both Yes No
- Billed: Both Yes No
- Billing Hold: All Once Yes/No Yes No

Buttons: Download, Clear, Cancel, Max Rows (highlighted with a red box), 1000

5.5.24

26-Jun-2018

Edit Events Form

Changed **Revenue Hold** options list field from a list of values to a radio button.

The screenshot displays the 'Edit Events Form' interface. At the top, there are tabs for 'Event' and 'Currency'. The form contains several input fields: Project, Task, Event Number, Agreement Number, Event Type, Event Date, Organization, Description, Bill Amount, Revenue Amount, and Bill Group. Each of these fields is highlighted in yellow. To the right of the Bill Amount, Revenue Amount, and Bill Group fields are checkboxes for 'Adj Revenue Flag', 'Rev Dist Flag', and 'Billed Flag' respectively. At the bottom of the form, there are two radio button options: 'Revenue Hold' and 'Billing Hold'. The 'Revenue Hold' option has three radio buttons labeled 'Once', 'Yes', and 'No', with the 'No' button selected. The 'Billing Hold' option also has three radio buttons labeled 'Once', 'Yes', and 'No', with the 'No' button selected. A red rectangular box highlights the 'Revenue Hold' radio button group. At the very bottom of the form are 'Ok' and 'Cancel' buttons.