

Corporate Services Release Report

Printed: 10/13/2009 3:51:48 PM

Page 1 of 7

Release Date: 9/18/2009

PR 10658 Issue with deleting line item from Kits

APP:RTMS

Release Notes:

Client Reports:

Client Reports that when editing kits to delete a line item, the system warns them that the item is on the kit then deletes the item and the item number on the following line.

Investigation Results:

This appears to be a problem with kits that were created prior to enabling the inventory preference "Disallow Serialized Item From Appearing on Multiple Kits" added via RFM 8825.

To replicate the error locally, perform the following steps:

- 1.) log into RTMS and disable the preference to disallow duplicate serialized items.
- 2.) Create two kits with serialized inventory items that do not exist on any other kits. Then create another kit with the same items as the second kit.
- 3.) Enable the preference to disallow duplicated items.
- 4.) Find the first kit created in step 2 above and click "edit." Delete an item other than the last item on the kit by clicking the "item" column and then clicking "delete" on the keyboard.

You will receive the following message:

Unable to add item to kit

This item already exists on this kit and cannot be added again.

OK

Click "OK" and it informs you that the item will not actually be deleted until you update the record and the kit item column on the following line is cleared.

- 5.) Find one of the other kits created in step 2 above and click "edit." Delete an item other than the last item on the kit by clicking the "item" column and then clicking "delete" on the keyboard.

You will receive the following message:

Unable to add item to kit

This item exists on kit TEST ADD 3 and cannot be added to another.

OK

Click "OK" and it informs you that the item will not actually be deleted until you update the record and the kit item column on the following line is cleared.

Result of Report:

Code was corrected to delete the appropriate line item.

RFM 9851 Modify Delivery ticket printout

DLL:CMNOBJ

DB:CS_SQL_SCRIPTS

APP:TRAKQUIP

DLL:PROFL

DLL:TICKET

Corporate Services Release Report

Printed: 10/13/2009 3:51:48 PM

Page 2 of 7

Release Date: 9/18/2009

RFM 9851 Modify Delivery ticket printout

Release Notes:

Client Request:

Modify printing of client's custom ticket style (X) as described in detail.

Proposed Modifications:

(7/31/09): New Capability:

A ticket style X was updated for client. Additionally, new flags were added to control printing credit codes and other fields on the ticket style X. A preference, 'Print Credit Code Option' is available for client that will allow users to flag different credit codes for printing. All functionality is specific to client and will not show up for other clients.

(9/15/09): Corrected bug caused by the new check boxes in the category.

RFM 10252 Modify rental contract clone function.

DB:CS_SQL_SCRIPTS

APP:DataImport

APP:TRAKQUIP

DLL:TICKET

Release Notes:

Client Request:

Add 5 more custom location fields to the rental contract header table.
Modify the data import function for rental contracts to include the new fields.

Proposed Modifications:

This request added 5 additional location fields to the rental contract header table. It also modified the Data import function for rental contracts to include the 5 additional fields.

PR 10210 Menu options disabled with permission set

APP:TRAKQUIP

Release Notes:

Client Reports:

When you have the "Create and Edit Invoices" and "Delete Invoices" permissions restricted, the "Reports" and "Invoice" menu option is disabled on the Invoice tab.

As a work around the user can click "Find" then "OK" and the menu options re-enable themselves.

Result of Report:

A code change was made to control the menu options by their individual permissions.

PR 10629 Populate purchase orders by subcategory preference causes Amt. Distributed Column to be hidden

APP:PO

Corporate Services Release Report

Printed: 10/13/2009 3:51:48 PM

Page 3 of 7

Release Date: 9/18/2009

PR 10629 Populate purchase orders by subcategory preference causes Amt. Distributed Column to be hidden

Release Notes:

Client Reports:

Turning on the Populate purchase orders by subcategory preference causes the Amt. Distributed column to be hidden and the Po Item Org. to become visible. Inserting the subcategory column shifts the remaining columns incorrectly.

Investigation Results:

Investigation reveals that the combination of the Populate purchase orders by subcategory preference in concert with the preferences to expose and re-locate the cost code columns were actually the source of the issue.

Result of Report:

Modified the code to remove the conflict between the preferences.

RFM 10512 Print Range option for Rental tickets and RA's

DLL:TICKET

DLL:VIEW

DLL:XMLHLPR

DLL:CMNCTRL

APP:TRAKQUIP

DLL:GFRMS

DLL:RENTAL

DLL:RETURNAUTHORIZATION

Corporate Services Release Report

Printed: 10/13/2009 3:51:48 PM

Page 4 of 7

Release Date: 9/18/2009

RFM 10512 Print Range option for Rental tickets and RA's

Release Notes:

Client Request:

Provide the ability to print a range of rental contracts and return authorizations based on the office and ship date or pick up date on the contract or return authorization header.

For example: In the rental contract tab provide an option to "Print a range of rental contracts". When selected, allow the user to choose an office, enter a date range, and print all rental contracts and return authorizations for this office with this date.

Overview and Background:

To activate the return authorization functionality, it is necessary to turn on the preference "Enable 'Return Authorization Maintenance'" in the "RETURN AUTHORIZATION" group. Currently return authorizations can only be printed from the "Return Authorization" maintenance form.

Proposed Modifications:

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- 1.) Add a menu item to the Rental Contract menu to "Print a range of rental contracts"
 - 2.) When selected, display a form with the standard "Get Copies" options, with the addition of the following:
 - a. Start Date, Stop Date
 - b. Start Ticket, Stop Ticket
 - c. Office - selection box
 - d. Print Rental Contracts - checkbox
 - e. Print Return Authorization - checkbox

NOTE: The "Print Rental Contracts" and "Print Return Authorization" checkboxes will only be visible if the "Return Authorization Maintenance" preference is enabled.

- 3.) When the user selects OK on this form, print all rental contracts and /or return authorizations as indicated by the user.
- 4.) Modify the client's custom rental contract printout, as well as the generic printout to allow printing a range of tickets in this manner.
- 5.) Make necessary modifications to the rental contract and return authorization printing logic to support printing multiple documents in a batch. Use logic similar to the "Compact Print" method recently added for invoices.

PR 10251 Manually entering sub-category on line item does not populate the details

APP:PO

Release Notes:

Client Reports:

With the 'Populate purchase orders by subcategory' preference enabled, users have the option to add line items to the PO spreadsheet via the subcategory. When you right click in this field and choose from a pick list, the item's details populate on the line. However if you manually enter the subcategory name and press the tab key no details are populated.

Result of Report:

A code change was made to populate the line when the preference is on and the user types in a subcategory.

PR 10373 Keyname cannot unpost Interoffice transfers

APP:RTMS

Corporate Services Release Report

Printed: 10/13/2009 3:51:48 PM

Page 5 of 7

Release Date: 9/18/2009

PR 10373 Keyname cannot unpost Interoffice transfers

Release Notes:

Client Reports:

Client requested keynamed logic be removed.

Investigation Results:

Special code was added in 2002 and keynamed to one client. This keyname is no longer needed due to preferences that were later added.

Result of Report:

Keynamed logic be removed.

RFM 10246 Add Unit of Measure functionality to RTMS

DLL:INVTY

APP:PO

DLL:PROFL

APP:RTMS

DB:CS_SQL_SCRIPTS

APP:TRAKQUIP

Release Notes:

Client Request:

The client keeps pipe in inventory as joints, but in some cases needs to set the number in feet on the ticket. The customer has reviewed the unit of measure conversion functionality in TrakQuip and would like to add the same functionality to RTMS.

One additional option they would like is the ability to handle the conversion so that the inventory item always reflects a whole number. For example, the current conversion is 31 ft per joint of pipe. When adding 310 feet of pipe to a ticket, the inventory should reflect 10 joints of pipe as out. If adding an additional 10 feet of pipe to a separate ticket, rather than display the joints out as a decimal, the system should round the number up to one whole joint so that the system shows an entire joint out on the ticket.

Proposed Modifications:

- 1.) Make the unit of measure conversion table and maintenance form currently implemented in TrakQuip available in RTMS.
 - 2.) Provide the ability to set the number of decimal places to round up to when processing unit of measure conversions. Rounding should always be to the next highest number.
 - 3.) Modify all inventory routines as needed to process the unit of measure conversion including, but not limited to the following: posting, un-posting, returns, un-returns, sales, and transfers.
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RFM 10515 New Credit Memo Restrictions and Modifications

DLL:BILG

DLL:PROFL

DB:CS_SQL_SCRIPTS

APP:TRAKQUIP

Corporate Services Release Report

Printed: 10/13/2009 3:51:48 PM

Page 6 of 7

Release Date: 9/18/2009

RFM 10515 New Credit Memo Restrictions and Modifications

Release Notes:

Proposed Modifications:

NEW PERMISSIONS: Make the following modifications and additions to the Invoice permission group.

1.) Add a restriction to prohibit users from manually creating an invoice using the "Add" button.

- Restricting use of the add button will eliminate the possibility of an invoice or credit being generated incorrectly by a user in the field. All Invoices should be generated through the Manager approval process or by batch invoicing.
All credits should be generated through the clone process.

2.) Change the description of the existing restriction "Invoices Clone" to read "Invoices Clone, Credit, and Re-bill." This restriction should continue to work as it currently works, restricting access to the entire "Clone Current Invoice" form. Add three new restrictions to independently control access to the "Create a clone of the invoice," "Create Credit Memo," and "Create Re-Billing Invoice" options.

- Currently, when you choose the menu option to "Clone Current Invoice" you are presented with several Options. The client would like to only allow the creation of credit memos from this form.

3.) Add a restriction for editing the Credit Memo field in the invoice header

4.) Add a restriction to lock the editing of all but the following fields on Credit Memo line items:

- a. Quantity
- b. Initial Term Rate
- c. Daily/Sales Rate
- d. Monthly Rate
- e. Total
- f. Start Date
- g. Stop Date

5.) Add a restriction to prevent saving positive values in the quantity and line total fields on the line items of a credit memo.

6.) Add a restriction to prevent users from saving non-comment lines on a credit memo.

7.) Currently the ability to edit credit memos is controlled by invoice restrictions. Rename the existing invoice permission settings to indicate they apply to both invoices and credit memos and add new restrictions to independently control the editing of invoices and credit memos. This should include the following invoice restrictions:

- a. Invoices Create And Edit - controls editing, but not adding credit memos.
- b. Invoices Clone - should be able to separately control the cloning of credit memos
- c. Invoices Delete
- d. Invoices Delete Rows
- e. Invoices Delete Printed Invoices if otherwise allowed

NOTE: With restriction for editing, the user should still be able to view the invoice header using the current right-click option on the customer or job number.

NEW PREFERENCES: Add the following new preference options to the invoice preference group.

8.) Add options to control the settings available when creating a credit memo from the "Clone Current Invoice" from:

- a. Credit Memo Numbering - a drop down combo box with the following options:
 - i. Selectable (default) - current functionality
 - ii. Invoice number + .1 - disables all other invoice numbering options
 - iii. Invoice number + 1 - disables all other invoice numbering options
- b. Credit Memo Comment - a checkbox which forces the setting of the credit memo comment setting

- These options will allow the client to specify how credit memos should be created and restrict the ability of the users to change them.

9.) Add an option to suppress the message beginning with "Are you sure you want to permanently delete this line item from this invoice?" that appears when a user deletes a line item from an invoice or credit memo.

10.) Add options to require a "reason" code for credit memos and re-bills and an option to specify a "reason" subcategory. When selected, and the user generates a credit memo or a re-bill invoices, automatically bring up an item pick list containing all comment inventory items with the specified reason subcategory. Require the user to select an item and add the item to the invoice as a comment line.

Corporate Services Release Report

Printed: 10/13/2009 3:51:48 PM

Page 7 of 7

Release Date: 9/18/2009

RFM 10515 New Credit Memo Restrictions and Modifications

NEW LOGIC: Make the following additional logic changes.

- 11.) Delete the credit memo reference comment from the originating invoice when a credit memo is deleted.
 - When using auto-insert reference comment, a comment is placed on the original invoice when cloning to create a credit. The client would like this comment removed if the credit is deleted.

- 12.) For this client only, automatically recalculate the credit memo line totals when saving a credit memo. The new line total should be set as follows:
 - a. Sale items - quantity * daily or sales rate
 - b. Initial term or renewal contract invoices - quantity * initial term rate
 - c. Renewal invoices - quantity * monthly rate
 - Most credits will be altered from the original state so the client would like the recalculate function to automatically execute upon clicking save.

- 13.) For this client only, when creating a credit memo, only carry over the rates actually used on the invoice being cloned.
 - a. Sale items - daily or sales rate
 - b. Initial term or renewal contract invoices - initial term rate
 - c. Renewal invoices - monthly rate

Added 8/12/09:

14.) In relation to the reason code functionality (item 10 above), provide a flag on the inventory form to indicate whether a reason code item requires a document when used. This flag should only be visible for items with the specified reason code subcategory. When the user selects a reason code from the pick list, if that reason code item requires a document attachment, bring up the document links form for the credit memo and require the user to attach a document.

RFM 10416 Add Ability to Tag Job Types as "Onshore" or "Offshore"

DB:CS_SQL_SCRIPTS

Release Notes:

Client Request:

Add the ability to tag job locations to job types and be able to report on these. Job types need to be marked as either "onshore" or "offshore" so we can report on them separately.

Proposed Modifications:

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1. User will enter job types such as "DRILLING - OFFSHORE" and "DRILLING - ONSHORE". This will allow us to implement without having to have the user select both a job type and a job location.

 2. Add a new column to the job types table for "job_location", which will be filled out with OFFSHORE or ONSHORE (or whatever job locations are desired). Add a new field to the job types table for this data.

 3. Create report in Reporting Dashboard to show job history / status by job types and filtering on new job location field.