

CIS Software Release

iVUE 1.8 Patch 1

November 2005

Note: The following release notes are for iVUE 1.8 Patch 1 only. If you are currently on a lower iVUE 1.7 release patch, you may also want to review the following additional supplemental release notes:

[iVUE 1.7 Patch 4](#), [iVUE 1.7 Patch 5](#), [iVUE 1.7 Patch 6](#) and [iVUE 1.7 Patch 7](#)

***Note:** Any item marked with an asterisk may need to have security turned on in order to see the screen in the left navigation. To do this, go to Roles in Security Administration and set up security for each Role that should have access to the screens identified with an asterisk in this release document.

Encryption

- Modified CIS to allow encryption of credit card and bank numbers. The encryption key will need to be established by the system administrator prior to accessing the EFT, EFT Bank Draft or EFT Recreate Bank Draft File screens. The Bank Draft table has a new column entitled BI_FIELD1_QQ which will hold the encryption for the individual rows. The EFT transaction and the Cash Register Payment tables will simply have numbers masked by the encryption key within those tables. As EFT and Cash Register entries are made, the credit card or bank number will be seen until the Save button is selected, and those numbers will be masked on the screen. (i.e., *****9999) The original numbers will only be seen within the flat file created for payment. (CR 315126) **Note:** You can access the following documents, [Steps For Using Encryption For 1.8](#) and [CISP Memo](#), for more detailed encryption information.

Frameworks

Searches

- Modified the customer searches so that when entry is by account number on one of the main panels, the search results will no longer gather all accounts for that customer number. It will display just the entered account number's information. If entry is by account from the Search dialog box, it will also display just the account entered, instead of all the accounts for the customer number with the account highlighted that was entered in the search results. This will speed up your searches when a customer has many accounts, and you want to focus on just one. (CR 308047)
- Corrected to display the member number on the account line in the Search results table, so it is always in the view. (CR 324973)
- Added a new option called Perform Only Customer Search to the Options menu in the Customer Search dialog box within Service Orders. When this new option is checked, it will only find matching customers and not bring back any accounts/agreements for that customer, so the Agreement Results frame will be empty. The advantage of using this new option is that it takes less time to pull in matches on the customer entered, especially when the customer has many accounts. If this option is unchecked, which is the default, then the customer search will continue to pull in both customer matches and all matching accounts/agreements for that customer. (CR 325765)



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Searches (continued)

- Corrected a problem that was causing the focus to change from the Service Location in focus to the first row displayed when a customer was in focus that had multiple service locations, and you navigated from one screen to another. This correction has been made to the following screens: Service Agreements, Service Location, Service Location History, Equipment Location, Equipment Install/Remove, Meter Install/Maint, Readings, Meter Exchange, Device Install/Maint, Load Controller Install/Maint, Miscellaneous Charges, Deposit, Annual/Seasonal, Addl Bill Calc Charges, Contracts, Aid to Construction, Extension of Service, YTD Patronage Adjustments, Year-End Patronage Adjustments, Outage History, Membership, Service Orders, Deposit, Billing History, Notes, Prior Yrs Alloc/Unret Adj. (CR 341073)

Customer Management

Agreements/Charges

Addl Bill Calc Charges

- Added option 999 to the Charge Months field. This entry denotes a permanent charge. (CR 324736)

Aid To Construction

- Corrected to place focus on the account most recently updated in the summary table. Prior to this change, when multiple accounts existed for a customer with the second one in the table being updated, the focus was then returning to the first account in the table, instead of the account that was changed. (CR 268533)

Deposit

- Corrected the transaction history to display the running AR Balance when a deposit amount for zero dollars is added or deleted. (CR 142256)
- Modified the "Delay Until Next Bill Calc" frame radio button options on the Deposit Refund/Transfer dialog box to allow the setting of a default selection. (CR 314839)
- Corrected the adjusting of a deposit installment amount and/or installment total amount when all the installments have been billed displaying remaining amount as zero. Prior to this change, a verification error was encountered if an adjustment was attempted. (CR 316787)

Extension Of Service

- Modified to calculate qualifying KWH as months applied times the monthly qualifying KWH. (CR 321387)
- Corrected the sequence of fields on the screen and the formula for calculating Monthly Qualifying KWH and Monthly Fee. (CR 335682)
- Changed to display the correct customer number in the Service Locations Current frame. (CR 343445)

Miscellaneous Charges

- Corrected to not reset the months from one to zero when a previous charge is deleted from an inactive account. (CR 273866)

Service Agreements

- Changed to allow the Disconnect Date field to be modified. (CR 98851)

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Service Agreements (continued)

- Corrected the spelling of 'minimum' on the Minimum Bill Code field for "0 – No Minimum" on the Minimums/YTD tab on the Service Agreements screen. (CR 334839)

Billing/Accounts Receivable

Account

- Corrected to place focus on the account most recently updated in the summary table. Prior to this change, when multiple accounts existed for a customer with the second one in the table being updated, the focus was then returning to the first account in the table, instead of the account that was changed. (CR 268543)
- Added the Internet password field to the Personal dialog box for an account specific address. When an E-Bill address and password are created for an account with an account specific address, the Internet password can now be modified. (CR 287502)

Account Number/Serv Loc Change

- Added a new option, "8 - Change service location number for all accounts and services," that allows you to change the service location number for all the accounts and services (providers) that exist for a particular service location. Options 2-7 are reserved for future enhancements. (CR 269244)

Accounts Receivable

- Modified the Rate Schedule and Revenue Class columns to include each code's description. (CR 268071)
- Changed the values of the Loans field on the Other tab to display the principal balance under the Total column and the loan monthly payment amount in the Next Billing column. (CR 269775)
- Corrected to continue to display the valid due dates once the current dollar amount gets bumped to the 30-day balance. (CR 285477)

Annual/Seasonal

- Fixed the problem of seasonal accounts that charge-off service charge billing for multiple months of charges instead of just one month of charges. This problem would only occur on utilities that do not prorate. (CR 345018)

Billing History

- Corrected the display filter to be account, provider, and service location number instead of account, provider, and service, so results change based on the service location number. (CR 292158)

Billing History Adjust

- Modified Previous and Present Reading dates to be required fields. (CR 102052)
- Corrected the "Unexpected System Problem" error that displayed when a round up charge was added to an account with no round up record. (CR 304959)
- Changed to not zero out current use days if the present reading code is equal to 5 - RE estimate, 6 - Computer estimate, or 7 - Repeating estimate. (CR 317215)
- Modified to cleanup the temporary tables, T_BHA_HISTORY, T_BHA_HIST_USAGE, T_BHA_HIST_CHG, and T_BHA_HIST_DVC after processing. (CR 323038)

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Billing History Adjust (continued)

- Altered the print functionality for Billing History Adjust, Billing History Auto Adjust, and Next Bill Calc screens based on the setting of the Allow Multiple Actives switch. Those sites which do not have the Allow Multiple Actives check box selected will see no change when they select the Print button from these screens. Those sites with the Allow Multiple Active check box selected (meaning one account with multiple locations exist) will use the browser when the Print button is selected and print from that location. The problem was that if there were many locations associated with one account, the print was one page and so small it could not be read. Use of the browser will allow the print to expand to multiple pages. (CR 332741)

Budget Billing

- Corrected to set the Catchup Month field to 0-None when switching from a Fixed to a Variable budget type. (CR 288920)

Next Bill Calc

- Added the estimate routine to Next Bill processing. Now when running a Next Bill, if a reading is not entered, the Next Bill process will go through estimation just like the standard Bill Calc. (CR 97230)
- Added logic to the Next Bill process so that any deposit interest refunds or deposit paid refunds processed through the Bill Calc will be shown on the Next Bill charges screen. (CR 138263)
- Corrected to no longer include meters with an attached code of "N" for screen display. (CR 286316)
- Modified to allow processing of non location based accounts with miscellaneous type charges only and no meters or devices. (CR 298340)
- Added a View Bill button which displays the currently calculated data in an HTML format with a print option. (CR 305660)
- Added logic to the Next Bill Calc process so that if it is being ran on a new connect or a final, the connect days, or disconnect days, are taken into consideration when calculating the Next Bill charges. This data was previously ignored, and the charges were being calculated for an entire month. (CR 321043)

Capital Credits

Customer Number Change

- Corrected so when changing a customer number that has no accounts, a transaction history row will be created. (CR 72889)
- Modified to set the Customer Status field correctly for the old customer when using option 3, Existing Customer Update CIS & Limited CC, and both active and inactive accounts are involved. The new customer status will be updated when the active account gets billed. (CR 287162)

Donated History

- * Created a charity entry screen which allows a customer to have his/her retirement donated. (CR 278702)

Credit/Collections

Collection Information

- Corrected an issue where the Collection Information wasn't always displaying when you clicked on the hyperlink. (CR 305777)

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Delinquent Schedule

- Changed to allow update of penalty process date, delinquent print date, delinquent2 print date, and cutoff print date when the Stage column does not display "Billing". (CR 87502)

NSF

- Corrected a problem when reapplying payments where a payment amount was reapplied that had never been reversed. (CR 270324)

Penalty Adjustment

- Corrected to only show one month of history for an adjustment when only one month of history existed. When multiple address types existed, multiple history rows were displaying on this screen. (CR 288086)

Customer Contacts

Customer

- Corrected the default feature to retain Organization as the default setting. (CR 258060)

Notes

- Corrected a problem that would retain the previous User ID and User Name when a new line of note was entered by a different user but on the same day. (CR 290484)

Payments/Readings

E-Bill Payments/Readings

- Changed the display order for both the Incomplete and Processed tabs to be descending by Enter Date/Time. (CR 284961)

EFT

- Added the application error dialog box stating "Updating cannot continue until Encryption password is established. Contact your system administrator". When cis_view_1.8 is updated, the encryption password needs to be entered prior to accessing this process. (CR 312715)

Payments/Readings

- Corrected a problem of the Cancel Cutoff notice truncating the second line of data when the payment was made from the Cash Register system. (CR 283597)
- Added a check to make sure the primary key constraint is not violated on the BI_TRAN_PMT_DTL table when posting payments or reversals. (CR 286315)
- Corrected an issue on the Payment Distribution dialog box which occurred when the Review Payment Distribution hyperlink was accessed more than once. (CR 291994)



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Payments/Readings (continued)

- Added an e-mail feature to the cancel cutoff notification which is in addition to the current print options for cancel cutoff. You will have the ability to just print (by not setting up the 'CUTOFF' work group), print and e-mail, or just e-mail (by selecting the new 'Do Not Print' cancel cutoff option in Session Controls or on the UDO screen). You can still disable all cancel cutoff notifications by clearing (No) the PYRD_CUT_OFF_SW for the desired UDO; this has not changed. The Cancel cutoff e-mail notification feature will automatically start once the 'CUTOFF' work group has been created and has active members for that work group. There are a couple of settings which are very important as outlined below. If the 'CUTOFF' work group is not set up, or there are no active members, the system will simply not send an e-mail notification at all, so this set up is not required.

To Set Up the Cancel Cutoff Work Group correctly:

1. On the Administration > Work Management > Work Groups screen, add the Work Group 'CUTOFF'. The value of Work Group (biWorkgrp) must be 'CUTOFF'. The Description (biWorkgrpDesc) of this group can be anything that describes that this work group is for cancel cutoff notification e-mails. The Printer field is not used.
2. On the Administration > Work Management > Resources screen > General tab, add a Human Resource (i.e., the person's name). If the resource to be used is already added, then skip this step.
3. On the Administration > Work Management > Resources screen > Notification Methods tab, click Add Row. The Notification Method (biNotifNm) must be either Internal E-mail or External E-mail. The Notification Value (biNotifValue) must be the valid e-mail address to which the cancel cutoff notice will be sent. The Used For Work Queue Notification check box (biQueueNotifySw) must also be selected. If it is not, the user you just set up will not receive the cancel cutoff e-mail.
4. On the Administration > Work Management > Resources screen > Work Groups tab, click Add Row. In the Work Group field (biWorkgrp), select the 'CUTOFF' work group created in step 1 (the actual description you keyed will be what displays in this field). The 'Listener Of All Task Assignments' check box (biListenSw) must also be selected. If it is not, the user you just set up will not receive the cancel cutoff e-mail.

You can set up as many members to the 'CUTOFF' work group as you want. To do this, repeat steps 2-4 for each user who is to receive the cancel cutoff e-mail notification." (CR 294551)

- Corrected an issue where an account has multiple meters, and each meter has different last valid reading dates. The second meter's last valid reading date was being used incorrectly in the verifier for the first meter. Now each meter's last valid reading date is properly used in the verifier to make sure the new present reading date is between the proper last valid reading date and today's date. **Note:** If you are changing the present reading date only, you can do this from the Meter Install/Maintenance screen, Reading Registers tab. (CR 298306)
- Corrected to not run the dial limit or high/low reading checks if the present reading code is a 9 - No Reading when changing the previous reading on an account. (CR 300626)
- Corrected a problem when reviewing the payment distribution on an invoice group account where the payment UDO #1 PYRD_REVIEW was set to A-Auto Update. After reviewing one invoice group's distribution then entering another invoice group, reviewing the second one displayed the distribution from the first. (CR 304253)
- Corrected a problem with losing batch totals when moving from one UDO to another in the same session. This was happening to those sites not integrated to GL. (CR 307356)

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Payments/Readings (continued)

- Modified to no longer check a reading date on previously estimated accounts. Prior to this change, if you were trying to change a present reading date to something less than the previous reading date, but greater than the last valid reading date, you were not able to do so. (CR 315916)
- Corrected self bill entry on a payment/reading session control to display the cycle control for calculation dates and fuels following the first account entered. (CR 337683)
- Corrected an issue that occurred during a payment reversal where a debit amount would be applied to the Credit Balance charge code, 990. This was causing the AR Detail rows to be incorrect and would prevent the AR Detail process from updating. (CR 342426)
- Corrected a problem that occurred when entering a payment on an account with multiple services that is also part of an invoice group. The UDO option to process invoices was turned off, but the payment entry still tried to process the invoice group and threw an exception. (CR 344313)
- Corrected a situation that occurred when the Route Code and Meter Seq were added to display tables throughout the CIS application. Previously, when Readings UDOs had the invoice group processing turned on, they tried to display the route code, but it was not there, and this caused an error to display. The retrieval by invoice group number has been changed to bring back the route code, which fixed the problem. (CR 344755)
- Improved the efficiency for filtering the payment rows when using the start/end dates in conjunction with the batch number. Previously when using the batch number and start/end dates, the filtering process slowed down the entire system. (CR 352179)

Readings

- Corrected a calculation problem with estimated 6 dial meters and added a 6 dial check for an over estimate limit of 800000. (CR 311640)
- Corrected an issue with an error message appearing when you clicked on the Rate/Taxes tab. (CR 345792)

Transaction History

Transaction History

- Corrected an issue where you would enter a miscellaneous charge for a certain service location and when you looked at the Transaction History screen, it had the first service location listed for that account, instead of the one that was chosen. (CR 298192)
- Fixed the problem with the Prenote field not getting updated on the Transaction History screen for additions or modifications to the EFT screen. (CR 301088)
- Changed the scroll bar to be located at the top instead of the bottom, when linking to PERSON after an address change is made to an account. (CR 302372)
- Corrected an issue with columns displaying the information backwards. If you move a column, the information goes with it. (CR 303982)
- Changed the element name of biPreNoteSw to biPreNotSw to match the bank draft column. (CR 312134)
- Corrected an error that occurred when clicking on the PRVDRINFO transaction on the File Maintenance tab. (CR 331244)

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Equipment Management

Distribution Equipment

Distribution Equip Inventory

- Created a new view for the SY_OPN_FLD_VIEW_SPCEQUIP table based on the BI_SPC_EQUIP table. This allows another Open Field view for custom reports. (CR 265228)

Load Management

Load Controller Inventory

- Removed the Copy button, since this button was not functional. (CR 299277)

Meters

Meter Number Change

- Corrected the Meter History screen from losing entries when changing the meter number. (CR 295997)

Transformers

Transformer Inventory

- Changed Transformer Inventory to use the new Open Fields functionality allowing entry of Notes and also being able to view Open Fields via the new expanded dialog box. (CR 346271)

Location Management

Equipment

Equipment Loc Install/Remove

- Corrected an issue with the Open Field(s) information not displaying on the Equip Location Install/Remove screen. (CR 303866)
- Corrected an issue of receiving an error message when trying to move a bank of transformers to a different equipment map location. (CR 322207)

Equipment Location

- Added the year and month to the graph found on the Transformer Loading screen. (CR 261876)
- Corrected the problem that occurred when an account had multiple service locations that were active. Instead of the active name displaying, the non-service point account was displaying. (CR 311866)

Service Location

Device Install/Maint

- Corrected an issue where you were unable to disconnect devices on the account without receiving an error message. (CR 282912)
- Modified to not update the attached code on a device if it came into the disconnect already inactive, status 2. Doing this was causing devices to bill erroneously. (CR 290331)
- Corrected the display of the device status on the Device Service tab. Prior to this correction, if an account had been disconnected in Service Orders, but the Device was left installed, the status was not displaying correctly on this screen. (CR 302564)

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Device Install/Maint (continued)

- Modified to update the equipment map-location as a space and not null on devices added to non-location based services, so that these devices would display on the Device Install/Maint screen. (CR 324504)

Load Controller Exchange

- Changed the Load Controller Exchange to carry forward the Open Field(s) attached to the load controller service and the load controller devices from the old load controller to the new load controller. If the load controller devices are not transferred in the exchange, then any open field(s) linked to the load controller device will be deleted from the Open Field(s) table. (CR 280620)

Load Controller Install/Maint

- Corrected an error that occurred when clicking on the Load Mgmt alert hyperlink. (CR 321314)

Meter Install/Maint

- Corrected so that when the Configuration is set to "Normal KWH Billing", the Connect Position will always be "0". Prior to this change, if you would change the Configuration to "C or S" that would enable the Connect Position field to open up where you could change the number. After you changed the number, and then changed the Configuration back to "Normal", it would then disable the Connect Position field, leaving the number that had been entered initially. Now when you pick "Normal", it automatically puts the "0" in the Connect Position field. (CR 290344)
- Modified to require a save if the Reading Route is changed, prior to clicking on the Reading Sequence hyperlink. (CR 292860)
- Modified to allow the 'Set Initial Tab as Default' to work properly. **NOTE:** Setting initial tab as default will not work in Service Orders, only in the Meter Install/Maint screen from the left nav. (CR 340265)

Service Location

- Corrected an issue that caused the device count to be inflated when an account had multiple locations. (CR 284693)
- Modified the screen to default to the Pattern After Not Used option and to not require an equipment map location with this selection. (CR 287154)
- Corrected an issue on the Consumption History tab that if you filtered by meter position or by date on the screen, it did not display Demand Reading or Present Reading columns. (CR 288534)
- Corrected an issue with the user default tab (Set as Initial Tab to Display) not working. Now you can set the user default tab for whichever tab you want to be the initial display. (CR 293187)
- Corrected the program that obtains the history usage row to ignore a null present reading date on the consumption history display. (CR 296142)

Work Management

Auto High/Low Service Orders

- Modified to allow selecting and deselecting of the Verified check box without creating a service order. (CR 294219)
- Established a new User Defined Option of "AUTOHILORDGS" to be used from the Reading dialog box in the query table. (CR 304658)



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Auto High/Low Service Orders (continued)

- Modified to allow the SO Type field to now display all MS (Miscellaneous Service Location) and MG (Miscellaneous General) service orders for creation. (CR 311562)

Contact Tracking

- Changed the Start Date/Time field to be required. (CR 281371)
- Corrected an "Unexpected System Problem" error that occurred when accessing Service Orders from a workflow in Contact Tracking. (CR 285207)
- Corrected so that the screen task, Consumption History, will display when used in a Contact Tracking workflow. (CR 295079)

Service Orders

- Enhanced to allow a service order that has been cancelled to be deleted. The delete will attempt to do everything as if delete had been selected initially, which includes deleting the account if the SO was created as a NEW or Reconnect NEW Service Order. **NOTE:** When going from a Cancelled status to a Deleted status, the Reason field will not be available for entry. (CR 33734)
- Modified to transfer Additional Bill Calc Charges, both transferring and adding new. (CR 123112)
- Added Equipment Map Location to display in the middle section of a Misc Equipment Location type of service order. (CR 285243)
- Corrected an error condition with Reconnect Service Orders where the install of the meter was trying to add to an existing service when there was no service there. (CR 285508)
- Modified to ensure that service status 06 accounts get the correct meter position number when needed. Prior to this change, service status 06 accounts were always creating a meter position of 1. (CR 288982)
- Corrected to no longer generate an error message when the "In" account of a Transfer Service Order has an Aid To Construction record. (CR 291379)
- Modified to carry over the Transf KVA Chg/Min field on a Transfer or Reconnect service order. (CR 294676)
- Corrected an issue where a Service Order could not be completed, because it was asking for a membership to be entered even though one already existed. This problem was due to the fact that the Service Order had previously been cancelled, and the membership had been processed prior to the cancel. (CR 294938)
- Corrected an error on the hyperlink of the transformer removal when retiring an account. (CR 295334)
- Corrected an issue that was letting you close Service Orders without the Open Field(s) being filled in on the Service Agreements screen if they were required. (CR 296128)
- Modified to not allow a retire service to an account that has the Disconnect options on the Service Agreement screen set to Notify And Transfer or Transfer Only, and the Owner customer number is different from the account's customer number. (CR 296351)
- Modified to better enable the Deposit Refund screen to display upon close of a service order under certain conditions. (CR 296425)
- Corrected an issue with a service order that needed to be deleted. (CR 297284)
- Corrected a problem that was causing an error to occur when in Service Orders and trying to connect an account with a main and subtractive meter. (CR 298819)
- Corrected an issue when changing a Service Status 43 to a 42 and then trying to process a Reconnect SO, which caused an error message to display. (CR 299147)

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Service Orders (continued)

- Corrected an issue where the meter rows were printing multiple times on the Service Order print outs, when there was not more than one meter installed. (CR 299611)
- Changed Reconnect New and Transfer Service Orders to now ask a question if a Device row exists with contract months. The question will ask whether you wish the contract to carry forward to the new tenant or not. Selection of Yes will cause the contract date and months to be carried forward to the new tenant. Selection of No will allow the device to carry forward, but the contract information will not. (CR 300459)
- Modified so that if the General Comments field is what is updated to the Work Order Description field, the Work Order Description field will not be updated again after the initial creation of the work order if the General Comments field is changed. (CR 306078)
- Corrected so that a service status 06 account with Transfer Only set on the Service Agreement screen will give the message that no options are allowed if using a Disconnect Service Order type that does not have Transfer set as an option. (CR 311136)
- Corrected an issue when changing a service status 6 account to an active metered account, which caused two reading rows to display on the Readings screen. (CR 311700)
- Corrected an issue that was not removing links properly when the service was retired. If all equipment is retired, the equipment location will be deleted. (CR 313408)
- Modified to populate the Print Sched Dt field on the Print dialog box if a service order print is time delayed. (CR 315786)
- Corrected an issue that left the Accounts Receivable screen grayed out when you added it to the workflow. (CR 330800)
- Corrected to no longer create a membership row for transfer if the disconnected account is not the primary membership. Corrected to allow primary memberships to be transferred on the same account to a different service location resetting the Primary Service Location. (CR 332687)
- Corrected an issue with the Advanced Search screen that occurred when more than 14 items were selected in the search criteria. The results returned could not be seen, because there was no scroll bar. (CR 336090)
- Corrected service orders to mark as "processed" any previous deposit amounts entered from the left navigation tree, not allowing any modification, prior to closing a pending order. (CR 338332)
- Corrected service orders to allow handling of multiple deposit amounts when the first deposit was entered from the left navigation and the second deposit through service orders. In this scenario, you could not get to the deposit entered through service orders to process it, so the service order could not be closed. (CR 338543)
- Corrected to open the Forwarding Address button on the Disconnect tab when doing a Transfer Service order. (CR 338563)
- Corrected the Print Dialog box to no longer display the Data Has Changed dialog box when you select Cancel. (CR 339731)
- Modified so that when the Print Dialog is in the workflow, that the dialog is marked completed, and workflow continues. Prior to this change, the Print Dialog was left open, and workflow would not continue. (CR 349922)
- Corrected to pull in the proper workflow template when multiple functions exist within one service order type. **Example:** Transfer SO has options for Disconnect, Transfer to Owner and Transfer New Name. This also corrects the issue with the wrong service status at close being set. (CR 351614)

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SO Cutoffs

- Modified to exclude those accounts with established payment arrangements from displaying within the summary table. (CR 270488)
- Modified to allow the DNP check box to be set on an account independently or at the time a service order is created. When the DNP check box is set independently, the check box can be viewed as set on the Service Agreement and Accounts Receivable screens. The Credit History screen will also be updated with a DNP event. (CR 301984)
- Corrected an issue with accounts not displaying within the summary table which meet the criteria for cutoff. Prior to this change, if a Cutoff service order existed which was closed and later reconnected, the system was only checking for closed Cutoff service orders to suppress an account from displaying in the summary table. Now if the account meets the criteria for cutoff, and a closed Cutoff service order exists, and the close date is less than the cutoff date, the account is being selected for display within the summary table. (CR 335921)

Work Queue

- Added "All" to the District Office and Service Area field selections. (CR 291502)
- Added the Work Order Number column to the work queue table. (CR 297798)
- Corrected so that when starting a task from the Show Workflow button, it takes you to the correct task within the Task dialog box. (CR 302356)

Administration

Agreements/Charges

Contract Types

- Removed the "C" - Combination as an option from the Contract Type field. (CR 297809)

Miscellaneous Charges

- Added an Apply To Annual/Seasonal check box and Prepayment check box for charge application. (CR 294104)

Billing/Accounts Receivable

Charges

- Removed the Delete button to prevent history from being deleted. NISC can delete Charge Codes upon request. Fixed the ability to modify descriptions on charge codes 451-500, as well. (CR 297066)

Capital Credits

Allocation Totals

- Corrected a problem that displayed the wrong provider's revenue class description. (CR 301798)

Company Controls

- Added the Charities tab to set up charity information, which is used on the Donated History screen. (CR 278625)
- Added code to check the AP Checks check box on the Estate Retirement process so that even if the AP Interface check box is not selected on the Misc Options control, it will flow through if the AP Checks field is selected. (CR 309688)

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General

GL Alias

- Corrected a problem that caused the Cost Element field to be required when adding a GL alias. (CR 305356)

Next Available Numbering Ctrl

- Modified so you can now review the "Last CIS journal number issued" under CIS > Administration > General > Next Available Numbering Ctrl. This is for display purposes only. (CR 268354)

Provider Control

- Modified to create the Charge Code Group Reference when a new provider is created. The Charge Code Group Reference field is displayed on the Administration > Billing/Accounts Receivable > Charges screen. (CR 284837)
- Corrected an issue with two definitions that needed to be switched for selections 0 and 1 on the Final Bill Immediate field on the BC Options tab. (CR 295603)
- Modified the provider cycle limit to default to one and added a verifier to ensure that it will always be greater than zero when new providers are added. (CR 306134)

Work Management

Task

- Modified screen tasks used in workflows, (these would be screens from the left navigation), to display the task type as N - Navigatable instead of Resource. A future release will include Navigatable as a Task Type option in the Task Reference in Administration. (CR 296947)

Reports

Administrative Billing

Cycle Control Print

- Corrected the report to display the PCA Factors. (CR 315836)

Capital Credits

Charity Reference

- * Created a report to list charity information, which was set up on the Administration > Capital Credits > Company Control screen under the Charities tab. (CR 278876)

Special Handling List

- * Created a Special Handling List that displays a listing of customers with a special handling code. (CR 278935)

Customer Management

Exports

Colorado Mailing Labels Export

- Modified to combine Coop ID and account number as an identifier number at the beginning of each record. (CR 348824)

Arrears

- Corrected a problem that caused Name to be suppressed when Sort = None. (CR 353010)



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Audit Confirmation Letter

- Changed the capitalization of the word Assistance to a lower case "a". (CR 340893)

Bill Register Report

- Corrected an issue where the Payments from the Billing History screen were showing as positives on the report instead of negatives. (CR 303131)

Charge History

- * Created a standard charge history report to allow entry of single or selected charge codes and run by range of billing periods. (CR 284978)

Customer Profile

- Modified this report to list all of the charges for a particular consumer. This report has a title change from "Consumer Billing History" to "Customer Profile". A parameter was also added for a beginning revenue year/month on the report. (CR 317611)

Deposit Activity Listing

- Added Journal Number as an option to the Primary and Secondary grouping and sorting. (CR 324548)

Deposit Installments

- Corrected an issue on the report where it was printing out the installments four times. (CR 339287)

Find Payment

- Added Provider as a parameter option. (CR 114389)

GL Alias With Description

- * Created a report to list reference information built on the Administration > General > GL Alias screen. (CR 314151)

GL Balancing Report

- Corrected an issue that was causing the GL Unposted Amount column to be reported incorrectly. (CR 306532)
- Fixed a problem that was causing Deposits to not be reported properly when multiple deposit types existed. (CR 312895)

Mailing Labels With Header

- * Created a new report to produce a label for every account number with the header line selection that displays in the first line of address. (CR 309195)

Miscellaneous Charges

- * Created a report to list Miscellaneous Charges. (CR 295993)

NSF Letter

- Corrected to no longer print out a second page that was the letterhead only. (CR 303439)

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Open Balance Register

- Added Total, Current, 30-, 60-, or 90-day parameter to report, so you can run it by the aging balance. (CR 328453)

Payment Arrangement Listing

- Added District Office to the parameter selection. (CR 90999)

Uncollectable Accounts

- Corrected a problem that caused the UA balance to display twice when a customer had two addresses associated to the same customer number. (CR 351253)
- Corrected an issue if the account had multiple address types set up in the BI_PERSONAL table, it was duplicating records on the Uncollectable Accounts Report. (CR 335291)

Equipment Management

Distribution Equip Inventory

- Corrected an issue with the Distribution Equipment Inventory Report screen. It was producing an error message when you would click on the Equipment Code Select field. (CR 337934)

Transformer List

- Modified the parameter selections to make the report run more quickly. (CR 317601)

Location Management

Lineworker Listing

- Modified to display service address and city instead of billing address and city. (CR 324298)

Map Customer CSV Export

Map Location CSV Export

Map Meter CSV Export

Map Transformer CSV Export

- * Created four .CSV Export files for Mapping use - Map Customer CSV Export, Map Location CSV Export, Map Meter CSV Export, and Map Transformer CSV Export. (CR 279752)

Transaction/Activity

AR Adjustment Activity

- Added Journal Number to the parameter selections for Primary Group, Secondary Group, and Sorting. (CR 324533)

Billing History Adj Activity

- Added Journal Number as an option to the Primary and Secondary grouping. (CR 324541)

Contract Activity

- Added Journal Number to the parameter selections for Primary Group, Secondary Group, and Sorting. (CR 332942)



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Membership Activity Listing

- Added Journal Number to the parameter selections for Primary Group, Secondary Group, and Sorting. (CR 324550)

NSF Activity

- Added Journal Number as an option to the Primary and Secondary grouping and sorting. (CR 324554)
- Corrected a problem with detail lines repeating. (CR 328779)

Operator Batch Listing

- Corrected the issue where the Total Adjustments and the Revenue were not adding up correctly in the Operator Batch Listing. They now equal each other. (CR 258045)
- Modified to report the correct information for BI_INSTL_START_DT of BI_TRAN_DEPOSIT and BI_PRENOT_SW of BI_TRAN_EFT. (CR 313764)

Payment Activity Listing

- Added a CONS CL CD column to the report so that you are flagged with a B when an account is a Budget account. (CR 331735)

UA Payment Activity Listing

- Added Journal Number to the parameter selections for Primary Group, Secondary Group, and Sorting. (CR 324555)

Work Management

Misc Map Loc SO

- * Created a new Miscellaneous Service Order By Map Location report for Transformer Exchanges. (CR 335858)

Miscellaneous Service Order

- Corrected the customer address to display on the print when run without an account number. (CR 320157)
- Corrected the customer phone number to display on the print when run without an account number. (CR 324314)

SO Analysis Update Selection

- Modified sections 1, 3, 4, and 8 of the Service Order Analysis Update Selection report to place a "*U*" at the end of each account listed on the report that has been updated. (CR 285943)

Work Progress Tracking

- Added Work Group to the report. (CR 313758)

Processes

Agreement Charges/Credits

Deposit Refund

- Modified to default both the "Create AP Check" and "Check Credit History" switches to agree with the "Interface AP Switch" in the CIS > Administration > General > Miscellaneous Options screen. (CR 319871)

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Transaction Recap

- Corrected to allow the combination of a deposit refund amount immediately with the interest portion of the refund to be held until the Bill Calculation process. (CR 284273)
- Modified the Account Recap so it will now report accounts that are out-of-balance because of contracts and will display all the associated details. (CR 296459)
- Corrected to agree with the Account recap when reporting out-of-balance conditions on memberships. (CR 325171)
- Changed the internal table holding miscellaneous charge codes. This table was only allowing 20 codes to be entered and has been increased to allow 36. (CR 336661)

Transfer/Refund Inactive Bal

- Modified so the AR Adjustment Activity Report will now automatically be run when the Refund Process has been run. This will allow you to see the GL journal information created as a result of the CIS adjustments. (CR 335679)

Bill Calculation/Print

CIS Bill Calculation

- Fixed the Reset button to clear out the fields that had information entered in them. (CR 107365)
- Changed the Deposit process within the Bill Calc to check an account's credit history based on the event-yrmo instead of the revenue-yrmo. (CR 261625)
- Added a new option to the entry screen to be used when the Final Bill Immediate selection is Y. The option "Perform Backup Before FBI Run" will default to a value of N. With the value set to N, no backup will be done prior to the FBI run. With it set to Y, then a backup will be performed as normal. This option was added to shorten the run time of a Bill Calc when it is an FBI run only. (CR 263972)
- Corrected the Next Bill process so that the power factor penalty is now applied. Previously, it was not applied because the KVAR readings were not passed through the Next Bill/Bill Calc process. (CR 267577)
- Retrofitted CAPS *XL-Plus* changes (versions 25 thru 42) excluding version 39.
 1. Display account on report where the rate on the account is blank or is not on the rate control.
 2. Added section 12 that will display account with seasonal rows, but the rate on the account does not have annual information.
 3. Added section 13 that will display tax tables that are missing the all 9's block.
 4. Added section 14 that will display accounts that have a present read date less than the previous read date.
 5. Display invoice sub accounts that are idle and have a balance, but whose master account is idle with no balance.
 6. Added additional note on ""Section 07 - Accounts not billed in excess of 360 days"" if current days is greater than 900.
 7. Added section 15 that will display accounts with service status 1 or 18 where the meter used switch = 'Y', and it does not have a meter.
 8. Added section 16 that will display rates where the current revenue month/year rate control does not match the previous month's rate control.
 9. Added section 17 that will display rates where the current revenue month/year rate control does not match the same month of previous year rate control.
 10. Added section 18 that will display accounts with multiple registers where one may be estimated, and one has a valid reading.

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CIS Bill Calculation (continued)

11. Added a check on the permanent and temporary special handle codes for invoice group accounts to section 11. If any account in an invoice group has a special handle code set, all accounts in the invoice group should have it set. If some are set, and some are not, all accounts in the invoice group will be listed on the report along with identifying whether the account has the special handle code set or not. (CR 295274)
- Corrected an issue with the Bill Ahead feature where devices were not calculating properly on a disconnect. The Bill Calc was looking for the wrong value in the attach code. (CR 296008)
- Added logic to the Bill Calc to not prorate charges when BI_APP_PRORATION_SW is on for charge codes 32, 37, 38, 39, and 40. This will prevent minimum charges from getting proration applied twice since the standard Bill Calc automatically prorates minimum charges if needed. (CR 300293)
- Added a new field to the database that allows you to use the deposit anniversary date to determine when the deposit should be refunded. The logic was added to the Bill Calc to use this field from the deposit type reference table, if set. (CR 300384)
- Corrected the problem with proration of the service charge on rated devices. (CR 303558)
- Corrected the Bill Calc for the Next Bill process, so that if a present reading is entered at the time of the next bill (not an actual valid reading), the present read date is used in calculating days, if required by the Bill Calc process (UDO settings). (CR 305203)
- Corrected the days calculation for device-only accounts. (CR 307401)
- Changed days calculation logic in the Bill Calc to allow days to calculate a negative number if Bill Ahead is a Y. This fixes the problem of back-dated disconnects not prorating correctly on bill-ahead services. (CR 311043)
- Changed the Deposit process within the Bill Calc to only refund the deposit interest if the BI_HOLD_DEP_INT_SW is set to an N. (CR 313759)
- Changed description on TAX-UDO #16, TAX-DMD-USE, to correctly state: When TAX-NO-USE-SW on Rate-Ctl is N, no taxes are calculated if total usage is zero. How should KW usage be included in total usage for taxing purposes. Also added two valid values for TAX-UDO #16: 0 - KW usage is not included in total usage and 1 - KW usage is included in total usage. (CR 319195)
- Added new valid value for Miscellaneous UDO #18, CALC-YR-MIN-CD, of 9. When this value is selected, only contract charges will be used to calculate the new yearly minimum value. (CR 323223)
- Changed the standard Bill Calc by adding a new estimate UDO #15, EST-UDO15-MIN-OVR-EST, that is used to indicate how to calculate minimums on over-estimated prorated accounts. The valid values of this New Estimate UDO are:
 - 0 - Bill credit usage and full up-charge (default)
 - 1 - Prorate the minimums but not usage
 - 2 - Ignore minimums on over-estimated accounts. (CR 325936)
- Fixed the logic so that calculated round up amount gets included in base budget amount when Charge Code 30 has apply-to-base-bud-sw of Y. (CR 327681)
- Fixed the Bill Calc deposit process so when the system is catching-up interest, the system uses the original deposit date. The Bill Calc was calculating the number of days to prorate the interest amount by using BI_CALC_INT_AFTER_MONTHS from BI_DEP_TYPE_REF added to the Deposit Date. This was causing the problem of not calculating the correct deposit interest amount when catching up deposit interest. (CR 328528)



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CIS Bill Calculation (continued)

- Changed the Bill Calc to get the current date that will be used to update history information for the current billing, from the application server instead of the database server. This will fix the problem of Deposit transactions showing as a date/time after the billing was run, instead of before. Also added logic to zero out the base budget amount when account is removed from budget in the Bill Calc. (CR 329738)
- Added logic in the Bill Calc to delete an account's Deposit-Installment entries when the installments have been fully paid. This should fix the problem of interest only refunding one month on accounts that had installments. (CR 329934)
- Fixed a problem in the Bill Calc that was causing a subscript out-of-range error when trying to insert a record into the BI_HIST_CHG table. (CR 330827)
- Fixed so that subtractive meters will be subtracted from the corresponding master meter. (sub RDG_NBR = master RDG_NBR). If there is no corresponding master, the usage from the subtractive meter will be subtracted from the master meter with RDG_NBR = 0. (CR 331576)
- Corrected an issue with two definitions that needed to be switched for selections 0 and 1 on the drop down for field "Bill Final Immediate field on the BC Options" tab. (CR 333138)
- Created a new Bill Calc program, BI-BC-FIX-PRIM-SRVLOC, that will fix any accounts with invalid primary srv-loc-nbr. This program will run at the beginning of the Bill Calc job and fix the following two invalid scenarios:
 1. Primary srv_loc is inactive but account has active srv_loc(s).
 2. Primary srv_loc is pending (Service Status 7) but account has srv_loc(s) with Service Status less than 40 and not equal to 7.A report can be found in job manager called "BC Fix Prim Srvloc Report" that will show any accounts fixed. The report will not be generated if there are no invalid accounts. (CR 333249)
- Fixed the problem of the Bill Calc script aborting when it is run with a different Revenue Year/Month based on the type of service, and there is a custom hook. The Revenue Year/Month was getting changed back to the original Revenue Year/Month, and programs after the custom hook would not find a matching cycle control. (CR 333548)
- Changed the Bill Calc script so that when DQ2 notices are printed on the bill, they print correctly. Had to change the 8th parameter the Bill Calc was passing to the DQ process, so it didn't run with an additional selection of map location. (CR 336702)
- Fixed a problem that was occurring on new connects that are seasonals that prepay. If an accounts does not pass all the Connect UDO's, it still calculates the prepay amount, but because it is considered a 'held' account, the prepay was never getting billed, and the new account code was not getting turned off. The next month the annual pay status was getting messed up, because the new account code was still turned, so it recalculated the prepay amount. A change was made to check the BI_NEW_ACCT_CD and the BI_BILL_PREPAY_AMT. If the BI_NEW_ACCT_CD is > 0, and the BI_BILL_PREPAY_AMT is > 0, the Bill Calc will move what is in the BI_BILL_PREPAY_AMT to the BI_ANN_PAY_STAT and BI_ANN_AMT of BI_AR instead of recalculating the prepay amount. (CR 340122)
- Fixed a problem in the Bill Calc that was causing an abort when processing a service status 7 account, pending connect, that had a roundup record. If processing month was the month year-to-date roundup is to print, the Bill Calc creates a 912 history charge, and service status 7 accounts were attempting to create this charge, but no history was created, so the Bill Calc would abort with a constraint error. (CR 342922)

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CIS Bill Calculation (continued)

- Changed the Bill Calc Round Up to prevent an abort when it tries to add a 912 (YTD Round Up) record to history charges on an inactive service that has active service with round up. Also fixed the problem of the Bill Calc aborting when there are more than 30 payments on an account. (CR 349327)

Next Bill Calculation Batch

- Changed the Bill Calc to not calculate new yearly minimum amount when processing the Next Bills or Auto Adjustments. (CR 343972)

Capital Credits

CC Transaction Summary

- Corrected the Ending Date field to display the last hour of the day, (23:59:59), so that when the Beginning and Ending Date fields are the same, data can be found. (CR 315590)

Check Rewrite

- Modified the Check Rewrite screen to use CCRW when marking AP Checks for the General Ledger Journal Function. When marking AP Checks, it will use CCUC for Unclaimed Rewrites and CCAB for Abandoned Rewrites. In addition, Estate Retirements was modified to use CCER. (CR 288327)

General Retirement

- Changed to always populate the check date on the T_CM_CHK_TABLE. Checks were not being created correctly. (CR 304803)
- Corrected to include the second line of the address. (CR 305029)

Credit/Collections

Bad Debt Write-Off

- Modified this process so the output of this report is in the .csv format. It will automatically default to "N"; click on it, and it becomes a "Y" for creating the .csv file in the xfer/misc directory. The .csv file layout contains all of the fields on the report, so the Collection Agency that receives this file can use what they want. When you run this process, it will not be sent anywhere until you print it out and send it. (CR 300711)
- Corrected to check an account with multiple agreements having a disconnect date later than the compare date entered. When this condition exists, the account with all associated agreements should be reported to the "Ineligible" section at the back of the report. (CR 321190)
- Corrected so the write-off date entered only needs to be greater than and not equal to the disconnect date on the account meeting the criteria for write-off. When an account met the criteria for write-off, and that date was equal to the disconnect date, that account was written off and reported to the ineligible listing out of the process. With this change, that account will be written off. (CR 342095)

Delinquent/Cutoff

- Modified to open the Dq2 Print Date field for entry when Print 2nd Delq - DQ2 is selected from the Type Of Run field, and the Reprocess check box is selected. Prior to this change, the Cutoff Print Date field was available for entry. (CR 271774)
- Modified to send the correct value of 3 (Penalty Calc) as the DQ process parameter for Off-Cycle Penalty Calc. Prior to this change, a value of 5 (Gross Calc Process) was being sent. (CR 284932)

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Customer/Account

CRC Export

- Modified so that if there are multiple locations, the system will no longer include inactive locations that are no longer valid. (CR 312536)

Equipment Service/Distribution

Batch Meter Exchange

- Corrected a problem that was causing the disconnect date of the "out" meter to use the current system date instead of the date that was passed within the Batch Meter Exchange input table. The Batch Meter Exchange will now use the date from the input table as the disconnect date for the "out" meter. This is the same date that was already being used as the connect date for the "in" meter. (CR 302772)
- Corrected the problem that was causing the "out" meter status to not be set correctly when status 9 was selected on the screen. (CR 302776)

Month-End

Month-End Process

- Modified to report State Grand Totals correctly. (CR 297281)
- Modified the Rate/Revenue Class and the Rate sections of the Month-End Sales Report to handle an unlimited number of rates so that all rate descriptions will display. (CR 303607)
- Modified the process by increasing the feeder and the Avg KWH/CON fields by two positions. In addition, the Consumer column heading has been changed to read Services. Also, the Invalid Feeder/Phase row has been removed if there are no services that qualify. (CR 309586)
- Modified to produce all requested reports. (CR 318758)
- Modified the Month-End Process to not include non-location based services on the Invalid Feeder Phase report. (CR 329620)
- Modified the Month-End Sales Report to report AR to AR transfers under Charge Code 49. (CR 331848)

Payments

EFT Bank Draft

- Changed the EFT verifier to ensure non-space or non-null values get passed to the EFT program. If the EFT_1 UDO module did not have values, and a space was embedded, the outcome was an incomplete parameter list. (CR 292925)
- Modified all references to the CID code removed from the process. (CR 307011)
- Removed the CID code from the EFT table due to security issues. (CR 312211)
- Added the application error dialog box stating, "Updating cannot continue until Encryption password is established. Contact your system administrator". When cis_view_1.8 is updated, the encryption password needs entered prior to accessing this process. (CR 312739)
- Changed the bank record to be written to a length of 94 characters in the script, with the 94th character now being a space. In the past, a character was written to the 94 position of this record, and some bank software could not handle the processing of the data correctly. (CR 321276)
- Corrected the Mult.txt output when Global is selected. The ticket field <#20> was being populated with "12345" instead of the account number. (CR 323089)

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EFT Recreate Bank Draft File

- Corrected the effective entry date to accept today's date as valid and change invalid date check to be less than the current date. (CR 291245)
- Added the application error dialog box stating "Updating cannot continue until Encryption password is established. Contact your system administrator". When cis_view_1.8 is updated, the encryption password needs entered prior to accessing this process. (CR 334013)

Remittance File Import

- Changed the error report name from HH Post Error File to Remit Post Error File on the Remittance File Import and Old Account Remittance processes. In addition, Batch Number and Payment Amount have been added to the error reports. (CR 270536)
- Changed the select statement for the remittance report when run in "report mode only" to not verify the type service. Since type service isn't used to validate whether or not a payment will post through remittance, the system will no longer indicate this as an error. (CR 331668)

Web Payments

- Modified the Web Payments process to close the journal if the Last Run Time is less than or equal to current date/time. Also included a statement on the EBILL TRANSFER AUDIT TRAIL RPT to indicate if the journal is being closed or not. (CR 333343)
- Modified so when the JAVA posting routine flags a record in the temp table as being in error, you will be notified during the posting of the Web Payment process. (CR 333563)

Readings

Hand-Held File Download

- Modified to add a service location number check to correct a problem with prompting for readings multiple times. (CR 293871)

Hand-Held File Import

- Corrected an error situation when creating multiple routes. (CR 295430)

Hand-Held Posting

- Revised the amount of data that is posted at one time. This alleviates a large amount of records all trying to post at once causing an error. (CR 284061)
- Added a new UDO to be used in batch postings of readings, "Should accounts reject during batch readings if they've had a meter exchange?" The default value is NO, and box is unchecked. If the box is checked, then the hand-held posting will reject the reading for accounts with meter exchanges. (CR 330897)

Import AMR Data

- Changed the headings on the error reports to "List of Meters in the AMR File with Readings of Zero" and "Error AMR Reading". (CR 296978)

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System

Test File Maintenance

- Corrected to no longer encounter an error, and finish until completion, when the Test Environments hyperlink is reentered for the second time after setting all parameters, and one of the original parameters is modified. (CR 285131)
- Corrected the full test file procedure to not delete rows on the SY_VERSION table and then insert them again when the process completed. (CR 286467)
- Added an option on the Job Purge to Include ABS. If this is checked along with Allow Purge from the Test File Maintenance screen, then the purge will now include ABS reports that are in Progress. (CR 345278)

Year-End

Year-End

- Modified to include the name of the service along with the patronage year as part of the report name for the Patronage Register and Credit Patronage Register output. (CR 117060)
- Changed so the No CC Number Exception Report will no longer be produced when the Year-End is run, since it is not needed. (CR 126951)
- Corrected to not truncate the Revenue Class Code field in the totals section of the Patronage Register. (CR 338873)
- Changed to allow you to request the Year-End for multiple type service groups. With earlier versions, only one or all type service groups could be requested. (CR 356484)

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