

InSite 4.7.1

Enhancements

Stockpile Management

- **Clone all stockpile measures on the Stockpile Measures page**

You can use the new *Stockpile Measures > Clone stockpile measures* form to clone all stockpile measures from a selected site and material to another site and material.

- **New Errors tab on the Stockpile Management page**

On the new *Stockpile Management* page, you can use the new **Errors** tab to view the stockpile error logs for the stockpile that you have selected in the **Stockpile Management** grid.

- **Distinguish between the entered and calculated stockpile measures on the Stockpiles page**

On the *Stockpiles* page, in the **Measures** grid, you can use the **Mandatory** and **Calculated** columns to distinguish between the entered and calculated stockpile measures.

- **New Measures grid on the Stockpiles page**

On the *Stockpiles* page, when you select a stockpile in the **Stockpiles** grid and its survey in the **Surveys** grid, all the configured stockpile measures for that stockpile are displayed in the new **Measures** grid.

- **Calculate balance for a new LIFO or FIFO stockpile**

You can now calculate the balance for a new LIFO or FIFO stockpile as a slice with a default value of zero is automatically created.

- **New Stockpile Management grid on the Stockpile Management page**

On the *Stockpile Management* page, you can use the new **Stockpile Management** grid to view the list of stockpiles with all the base measures. You can select a stockpile in this read-only grid to view the details of that stockpile.

- **Separate Inputs and Outputs tabs on the Stockpile Management page**

On the *Stockpile Management* page, when you select a stockpile in the **Stockpile Management** grid, you can view the inputs and outputs of that stockpile in the **Inputs** and **Outputs** tabs, respectively for the selected date range.

- **Balances tab on the Stockpile Management page**

On the *Stockpile Management* page, you can use the **Balances** tab to view a history of surveys, balances, and adjustments for the stockpile that you have selected in the **Stockpile Management** grid for the selected date range.

- **Individual chart for each stockpile measure on the Stockpile Management page**

In the charts list on the *Stockpile Management* page, you can view an individual chart for each selected base measure and for grade or contained material of each selected chemical compound for the selected date range. You can also print the charts or save them in the **.jpg**, **.png**, or **.pdf** format.

- **Clear all the filters and export data to a Microsoft Excel file on the Stockpile Management page**

On the *Stockpile Management* page, you can use the **Clear filters** and **Export to excel** icons on the **Balances**, **Inputs**, **Outputs**, and **Errors** tabs to clear all applied filters and export all filtered data to a Microsoft Excel file, respectively.

- **Add and edit survey comment on the Stockpiles page**

In the **Stockpiles > Surveys** grid, you can add and edit a comment for the survey in the new **Comments** column.

- **New buttons for timeline selection on the Stockpile Management page**

In the **Stockpile Management > Timeline** area, you can use the new **Previous Period** or **Next Period** button to decrement or increment your selected date range, respectively.

- **Improved user interface and compatibility for the Stockpile Management page**

The *Stockpile Management* page has a new responsive user interface. You can view this page on multiple web browsers and tablet devices. On this page, you can:

- select a date range, and view and export (to a Microsoft Excel file) filtered stockpiles, surveys, balances, adjustments, inputs, outputs, and stockpile errors
- calculate balances, convert a balance to a survey, and balance slices for the selected LIFO or FIFO stockpile
- view and print or save the chart for each base measure and chemical compound (grade and contained material)

- **New Stockpiles page in the Stockpile Management module**

On the new *Stockpiles* page, you can:

- add, edit, clone, and delete stockpiles and surveys
- perform bulk calculate balances and bulk convert to surveys
- open the Manage surveys form to add or edit survey for multiple stockpiles
- export stockpiles, surveys, and stockpile measures to a Microsoft Excel file

- **New Stockpile Measures page in the Stockpile Management module**

On the new *Stockpile Measures* page, you can:

- view a list of stockpile measures grouped by **Site** and **Material**
- add, edit, clone, and delete stockpile measures
- export site materials or stockpile measures to a Microsoft Excel file

- **Add a stockpile on the Stockpiles page**

On the *Stockpiles* page, you can use the **Add stockpile** icon in the **Stockpiles** grid to add a new stockpile. A survey with a default value of zero is added for this stockpile. When you add a new LIFO or FIFO stockpile, a slice with a default value of zero is also added for this stockpile.

- **Edit a stockpile on the Stockpiles page**

On the *Stockpiles* page, in the **Stockpiles** grid, you can edit the values for the selected stockpile.

- **Clone a stockpile on the Stockpiles page**

On the *Stockpiles* page, you can use the **Clone stockpile** icon in the **Stockpiles** grid to clone the selected stockpile. A survey with a default value of zero is added for this stockpile. When you clone a LIFO or FIFO stockpile, a slice with a default value of zero is also added for this stockpile.

- **Stockpile visualization on the Stockpile Management page**

In the *Stockpile Management* page area, you can view a visual representation of details such as, base measures, inputs, outputs, and opening and closing balances for the stockpile and date range that you have selected in the **Stockpile Management** grid.

- **Calculate the balance for a stockpile on the Stockpile Management page**

On the **Stockpile Management > Balances** tab, you can use the **Calculate balance** icon to calculate the balance for the selected stockpile. You can calculate the balances only for the stockpile that is not locked on the balance date. You can view the newly calculated balances on the **Balances** tab.

- **Convert the balance to survey for a stockpile on the Stockpile Management page**

On the **Stockpile Management > Balances** tab, you can use the **Convert to survey** icon to convert the selected balance to survey for the selected stockpile. You can convert a balance to survey only for the stockpile that is not locked on the balance date. You can view the new survey on the **Balances** tab and in the **Stockpiles > Surveys** grid.

- **Calculate the balances for all the stockpiles on the Stockpiles page**

On the *Stockpiles* page, you can use the **Bulk calculate balance** icon in the **Stockpiles** grid to calculate the balances for all the filtered stockpiles within your selected date range. You can view the newly calculated balances on the **Stockpile Management > Balances** tab.

- **Convert the balance to survey for all stockpiles on the Stockpiles page**

On the *Stockpiles* page, you can use the **Bulk convert to survey** icon in the **Stockpiles** grid to convert the balance to survey for all filtered stockpiles within your selected date range. You can view the new surveys in the **Surveys** grid and on the *Stockpiles* page.

- **View the latest survey date and balance date for the stockpile**

In the **Stockpile Management > Stockpile Management** and **Stockpiles > Stockpiles** grids, you use the **Last Survey Date** and **Last Balance Date** columns to view the latest survey date and balance date for the stockpile.

- **Filter stockpiles based on their material type on the Stockpiles page**

On the *Stockpiles* page, you can now filter the list of stockpiles based on their material type in the **Material Type** column in the **Stockpiles** grid, prior to bulk calculating the stockpiles.

- **Trend for base measure on the Stockpile Management page**

On the *Stockpile Management* page, when you select a stockpile in the **Stockpile Management** grid and its base measure in the stockpile measures list in the **Timeline** area, you can view the trend for the selected base measure.

- **New Stockpiles grid on the Stockpiles page**

On the *Stockpiles* page, you can use the new **Stockpiles** grid to view the list of all the stockpiles, and add, edit, clone, and delete a stockpile. You can also use the **Bulk calculate balance**, **Bulk convert to survey**, and **Manage survey** icons in this grid.

- **New Surveys grid on the Stockpiles page**

On the *Stockpiles* page, you can use the new **Surveys** grid to view all the surveys for the stockpiles that you have selected in the **Stockpiles** grid. You can add, edit, clone, and delete a survey for the stockpile.

- **Auto balance on the Edit LIFO/FIFO balances form**

On the *Stockpile Management > Edit LIFO/FIFO balances* form, you can use the **Auto balance** icon to allocate a survey value to one or more existing LIFO or FIFO stockpile slices, which balances the stockpile slices against the survey.

- **Improved user experience for configuring stockpile measures**

On the *Stockpile Measures* page, you can now:

- filter site and material in the **Site Materials** grid to list all the related stockpile measures
- add multiple measures simultaneously without refreshing the **Stockpile Measures** grid
- clone a measure within a selected site and material, and also clone all measures from a selected site and material to another site and material

- **View all the base measures for each stockpile on the Stockpile Management page**

On the *Stockpile Management* page, you can view the closing balance for all the base measures for each stockpile in the **Stockpile Management** grid, for the selected date range. If a base measure is not configured for a stockpile, the first additive measure value is displayed in the grid.

- **Stockpile adjustment values on the Balances tab**

On the *Stockpile Management* page, you can use the **Balances** tab to view the history of all stockpile adjustment values of all stockpile measures, for the stockpile that you have selected in the **Stockpile Management** grid.

- **New Stockpile Name column in the ad hoc reports**

You can now configure the new **Stockpile Name** column to display the name of each stockpile in the ad hoc reports.

- **New Lock State column on the Balances tab and in the Surveys grid**

On the **Stockpile Management > Balances** tab and in the **Stockpiles > Surveys** grid, the new **Lock State** column indicates (visually) whether the balances or surveys are locked (for accounting period or material balance) or unlocked for the selected dates.

- **Add a new stockpile slice on the Edit LIFO/FIFO balances form**

On the *Stockpile Management > Edit LIFO/FIFO balances* form, you can use the **Add slice** icon to open the *Adjust slices* form. On the *Adjust slices* form, you can add a new slice for the selected LIFO or FIFO stockpile, and add values for this slice manually or by using the **Copy from survey** or **Set to zero** icon.

- **Adjust the slice values on the Edit LIFO/FIFO balances form**

On the *Stockpile Management > Edit LIFO/FIFO balances* form, you can use the **Adjust slice** icon to open the *Adjust slices* form. On the *Adjust slices* form, you can edit the slice values for each stockpile measure manually (entering a positive value) or by using the **Copy from survey** or **Set to zero** icon.

- **Add and edit the values of survey for all stockpiles on the Stockpiles page**

On the *Stockpiles* page, you can use the **Manage surveys** icon to open the *Manage surveys* form. On the *Manage surveys* form, you can add and edit the values of survey for all stockpiles that are recorded on a specific date, when the stockpiles are not locked on that date.

Issues Fixed

Operational Data

- **Exceptions occurred when data was filtered on the Data Enquiry page for a specific case**

Previously, in the **Data Enquiry > Activity Events** grid, when you applied the **Select All** filter for a column and then cleared one or more selected filter criteria, data was not filtered for other columns in the grid. This issue is now resolved and exceptions no longer occur.

Stockpile Management

- **Duplicate stockpiles were created when the Save changes icon was clicked multiple times after adding a stockpile**

On the *Stockpiles* page, when you use the **Add stockpile** icon to add a new stockpile in the **Stockpiles** grid, you can now click the **Save changes** icon only once. Therefore, duplicate stockpiles are no longer created.

- **The Stockpiles list did not display the names of all the stockpiles for some cases**

On the *Stockpile Management* page, the names of all the stockpiles are always displayed in the **Stockpile Management** grid.

Shift Management

- **The grid footer on the Planning page and the Reference Data pages was not displayed by default**

On the *Shift Management > Planning* page and the *Data Management > Reference Data* pages, the grid footer with all pagination options is now displayed by default.

Documentation Changes

Integration

- **Updated the name of a field in the Reference Data help section**

In the **Integration > Learn About > Data Formats > Reference Data** help section, the name of the field **DefaultCode** is now updated to **DefaultsCode**.