



## Q3 2017 Release Notes



**October 5, 2017**

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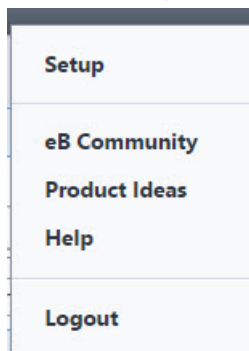
## About the Q3 2017 Release

e-Builder quarterly releases include improvements to a targeted area of the product and usability enhancements that increase the ease-of-use of current features and functions across the entire product. The latter is a culmination of user feedback and requests. In addition to enhancements, a list of resolved cases for the month is also enclosed.

### Your Opinion Matters

We rely on your feedback to better serve you. If you have ideas about improving our product or service, please don't hesitate to let us know. Below are four ways to reach us.

- **Like/Dislike**  – Located in the banner of e-Builder Enterprise™ are like and dislike buttons. Click these to express your opinion of a particular page. This feedback is used to help prioritize upcoming product enhancements.
- **e-Builder Product Ideas** – The Product Ideas portal gives you a platform to share your thoughts on how to make e-Builder better. You can read and vote on the ideas of fellow e-Builder users or post your own. Number of votes are taken into account when forming e-Builder's roadmap. To access the Product Ideas portal, click the arrow next to your username within the banner of e-Builder Enterprise, and then click Product Ideas.



- **Support** – Our Support staff is always available to meet your needs. To speak to a live customer service representative, call us within the U.S. at 888-288-5717 and outside of the U.S. at 800-580-9322, or email us at [support@e-builder.net](mailto:support@e-builder.net).
- **Annual Technology and User Conference** – The annual e-Builder Technology and User Conference offers a unique and up-close opportunity to gain insight into e-Builder product direction, learn best practices from industry professionals and peers, and to exchange information and ideas with members of the e-Builder community.

## What's included in this Document

- A description of each product enhancement
- List of resolved cases

**Note:** The release is scheduled to be completed between the hours of 10pm EDT and midnight which will not impact system availability.

## Release Note Change Log

The release note change log includes all changes made to this version of the Release Notes document.

Date	Version Number	Description
October 5, 2017	1.0	Initial release
November 16, 2017	1.1	Dynamic Grid Enhancement Content

## Summary of Features and Impact to Users

Feature	Immediately Available No setup required	Setup Required
Dynamic Grid Enhancements		✓
Document Content Search Enhancements	✓	

There is set up required to access these enhancements. If you are interested in activating this new functionality, please contact account management.

## Product Enhancements

### Dynamic Grid Enhancements

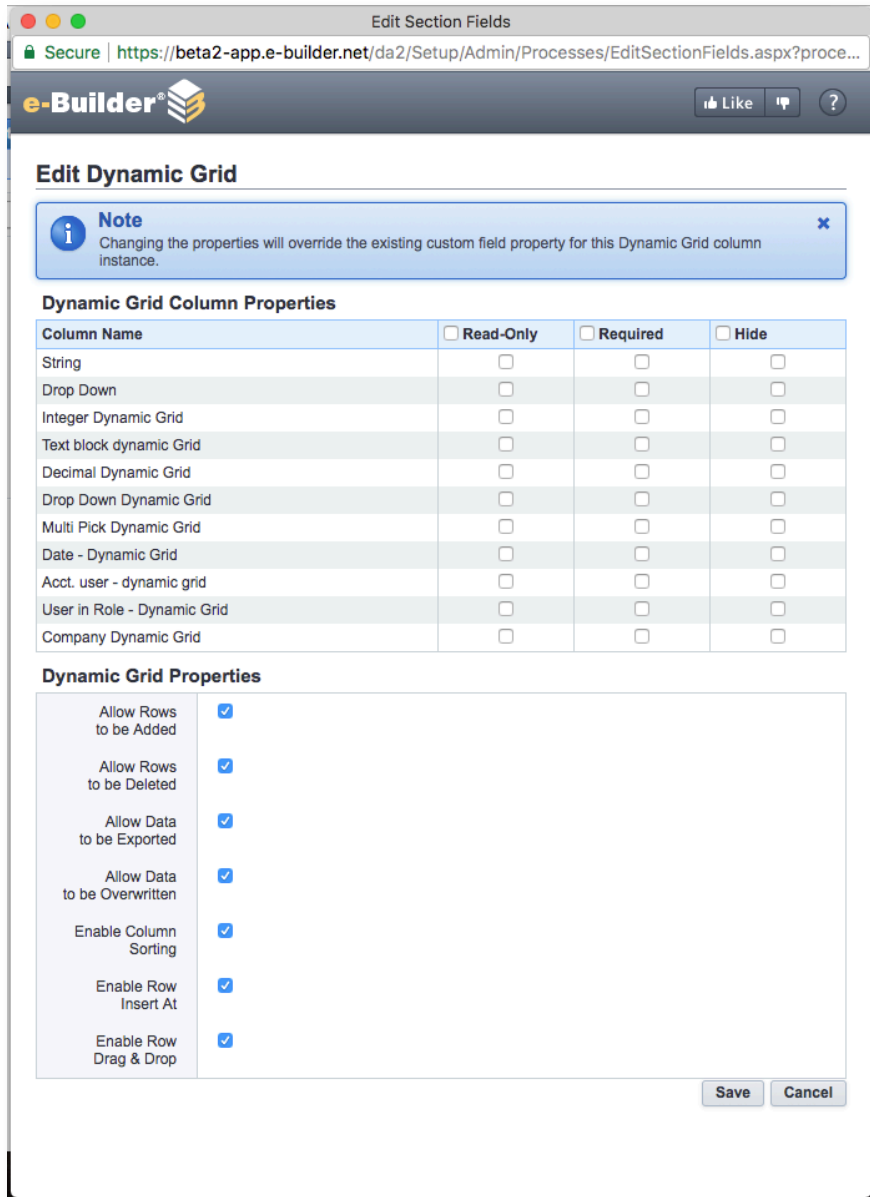
Several enhancements have been added to dynamic grids in the latest release. These new enhancements are designed to make it easier to use and manage data in dynamic grids when working with multiple users or large sets of complex data in a collaborative process.

#### Dynamic Grid Enhancement Setup

The new dynamic grid enhancements are setup to be enabled and controlled by administrators using the existing dynamic grid properties when configuring dynamic grids on process page layouts. This enables fine grain control over the availability of the new features down to specific page layouts allowing you to make features available or not in different stages of your process workflow.

You can access and configure the new dynamic grid enhancements through [Manage Process](#) in the account setup section by navigating to [Setup >> Processes >> Manage Processes](#). Once on the process detail page, access the Page Layout tab and pick the specific Layout Name.

1. From the View Layout Page, click the edit button.
2. Select the dynamic grid and right-click to bring up the Edit Field Properties menu.
3. Click on the Edit Field Properties menu. The Edit Section Fields pop window will appear. As shown below.



If you are familiar with this window, you will notice that there are 5 new options which allow you to control the use of the new dynamic grid enhancements. The new options are listed here for reference. Additional details on the capabilities of these features can be found below in the document.

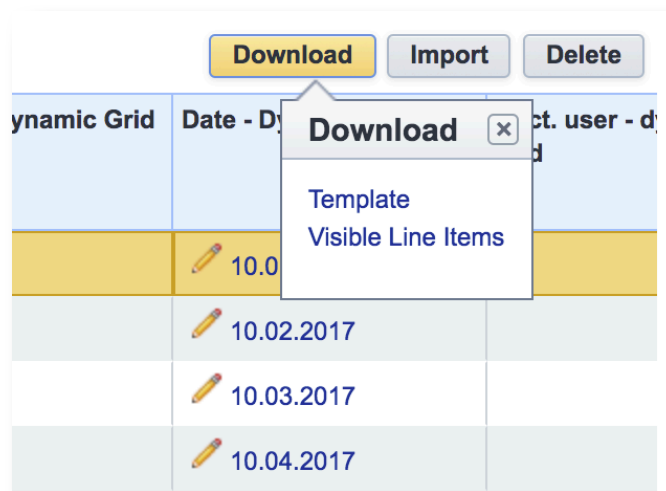
- Allow Data to be Exported
- Allow Data to be Overwritten
- Enable Column Sorting
- Enable Row Insert At
- Enable Row Drag & Drop

Simply select the options using the check box to enable or disable the new features on the specific page layout that you are editing.

### Dynamic Grid Data Export

You can now allow users to download the data that is currently in a dynamic grid. This provides additional flexibility for users to edit, update or add row data offline using spreadsheet tools like Microsoft Excel. You can then use this with the new Import/Update capability detailed below to update information in the grid from the spreadsheet. You can enable this feature by checking the “Allow Data to be Exported” checkbox.

When this capability is enabled, users will see an option to download Visible Line Items when they click on the Download button as show here:



The download visible line items capability is intelligent and works in conjunction with the filter capabilities in the dynamic grid. By default, if no filters are set, this will download all rows of data in the dynamic grid. If the user is currently using a filter on the dynamic grid, the download visible lines capability will only download the rows that are currently visible to the user. This provides flexibility to work with the specific data desired.

### Import Updates to Dynamic Grids

Dynamic grids can now support importing updates and changes to existing rows of data in the grid. Along with the new export capability, this provides a flexible and easy way to update and edit data offline in Excel and then import the changes into the dynamic grid. If new rows of data are added in the spreadsheet, they will be added as new rows during the import process. Existing rows that are updated offline in the spreadsheet will be updated with the new values when imported.

To utilize this feature, you will need to check the “Allow Data to be Overwritten” check box in the dynamic grid properties on the page layout.

### Sorting Dynamic Grids by Column Values

Dynamic grids now support the ability to allow sorting based on a selected column value. Like other grids in e-Builder, if sorting is enabled on the grid in the page layout, users can click on the column header to sort the grid based on the column value in either ascending or descending order. This capability needs to be enabled on the page layout by checking the “Enable Column Sorting” checkbox on the dynamic grid properties.

*Note: columns that contain multiple data values do not support sorting.*

	#	String	Drop Down	Integer
Delete	8	Project 4 Notes	Drop Down 4	
Delete	7	Project 3 Notes	Drop Down 3	
Delete	6	Project 2 Notes	Drop Down 2	
Delete	5	Project 1 Notes	Drop Down 1	
Grand Totals (4 items)				

Add New Item for Dynamic Grid

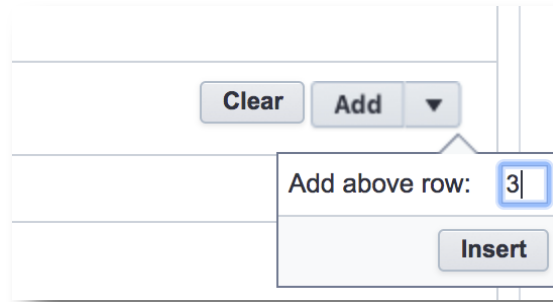
*Example of grid sorted by the # column, in descending order.*

### Insert New Row in a Dynamic Grid

You now can insert a new row into an existing dynamic grid to control the order in which the item is displayed. Previously, the only option available was to add a new row, which was automatically added at the bottom of the grid. Users now can insert a new row above an existing row in the dynamic grid by clicking on the down arrow in the Add button. Clicking the down arrow will provide a pop up window allowing the user to enter a row number that the new row should be inserted above as shown below.

This capability can be enabled by checking the “Enable Insert Row At” checkbox in the dynamic grid properties on a page layout.





Clicking the arrow allows you to insert a new row above an existing row.

### Re-order Rows Using Drag & Drop

Dynamic grids can now support re-ordering of the display of rows using drag and drop. This provides a simple and intuitive way to change the display order of the rows in the dynamic grid. Users can click and drag the first column cell on a row and move it up or down in the grid. When the mouse button is release, the rows position will be changed in the grid display.

This capability can be enabled by checking the “Enable Row Drag & Drop” checkbox in the dynamic grid properties on the page layout.

*Note: changing the display order of rows will not change or updated the # column of the row. The row # value is preserved for tracking and history purposes. Only the display order of the rows is updated.*

	#	String	Drop Down	Integer Dynamic Grid	Text block dynamic Grid	Decimal Dynamic Grid	Drop Down Dynamic Grid	Multi Pick Dynamic Grid
Delete	5	Project 1 Notes	Drop Down 1	1	Project 1 informatio...	1,111.11	DD 1	MP1
Delete	6	Project 2 Notes	Drop Down 2	2	Project 2 informatio...	222.22	DD 2	MP2
Delete	7	Project 3 Notes	Drop Down 3	3	Project 3 informatio...	3,333.33	DD 3	MP3
Delete	8	Project 4 Notes	Drop Down 4	4	Project 4 informatio...	44.44	DD 4	MP4
<b>Grand Totals (4 items)</b>								

**Add New Item for Dynamic Grid**

String:

Drop Down:

	#	String	Drop Down	Integer Dynamic Grid	Text block dynamic Grid	Decimal Dynamic Grid	Drop Down Dynamic Grid	Multi Pick Dynamic Grid
Delete	5	Project 1 Notes	Drop Down 1	1	Project 1 informato...	1,111.11	DD 1	MP1
Delete	8	Project 4 Notes	Drop Down 4	4	Project 4 informato...	44.44	DD 4	MP4
Delete	6	Project 2 Notes	Drop Down 2	2	Project 2 informato...	222.22	DD 2	MP2
Delete	7	Project 3 Notes	Drop Down 3	3	Project 3 informato...	3,333.33	DD 3	MP3
Grand Totals (4 Items)								

Add New Item for Dynamic Grid

String

Drop Down

*Example of re-ordering row #8 using drag and drop.*

## Document Content Search Enhancements

A new document parsing and indexing technology is being deployed in e-Builder that will significantly improve and enhance search results when searching for content inside documents that are stored in e-Builder. There are no changes to the way that you currently search for content in documents. You will see the same search box and the capabilities to target searches to specific projects and components as well as define specific document custom field values will be the same.

The main difference that you will notice is that the search results for content in Documents, should greatly improve. With the new enhancements you can expect the following benefits:

- Improved indexing of text content in standard documents
- Indexing of text in image and PDF documents using OCR (Optical Character Recognition)
- More effective content search results
- Better ranking and display of relevant results
- Dramatically shorter times for newly uploaded documents to show up in search results

## Resolved Cases

The following is a list of resolved cases for the month of September. If you have any questions regarding this maintenance release, please contact e-Builder Support at 888-288-5717 or via email at [support@e-builder.net](mailto:support@e-builder.net).

Module	Number of Resolved Cases
Cost	1
Documents	1
Processes	7
Reports	2
Cost	3
Documents	2
Processes	6
Reports	11
Schedule	3
User Setup	1

## Cost

### Case Number: 00221419

COMMITMENT TOTALS EXCEED TOTAL FUNDING

Importing a project was not saving the preference for funding at project level. The account settings for "Do Not Allow Committed Amounts to Exceed Funding Source Amount" and "Do Not Allow Actual Costs to Exceed Funding Source Amounts" should be added to the project when its imported, with the value enable or disable according the account selection because the account setting will be used as default for new projects.

## Documents

### Case Number: 00231531

BLUEBEAM BUTTON SHOWING WHEN ATTRIBUTE IT NOT ENABLED

Bluebeam button appears on start process instance page on accounts that don't have the attribute turned on. Now, the button does not appear if attribute is not turned on.

## Processes

### Case Number: 00201955

CANNOT MODIFY OR DUPLICATE START LAYOUT ON PROCESS

The issue was that the compute logic 'MaxDisplayOrder' for section was incorrect on the 'Edit Layout' page. 'MaxDisplayOrder' field was computed before compute 'DisplayOrder' for section fields. Now the compute logic 'MaxDisplayOrder' was fixed for this section. 'MaxDisplayOrder' field will be computed after compute 'DisplayOrder' for section fields.

### Case Number: 00211129

FORMATTING ISSUES IN COMMENTS WHEN PRINTING CURRENT VIEW

Previously, the table column has default styles with incorrect width. The default styles were cleared for table column. The system was throwing an error when was checking for errors in the workflow because it was duplicating IDs during validation. Now, the error check functions as expected.

### Case Number: 00211156

DYNAMIC GRID "GROUP BY" FEATURE DOES NOT WORK PROPERLY

Previously, incorrect works ordering in 'dataview' by default. Now the 'slick.dropdowngroup' plugin was fixed as well as set up ordering by ascending for grouping in dynamic grid.

### Case Number: 00217163

BUDGET CONTROL: "CONTROLLED BY LINE ITEM" IS NOT HONORED

Negative budget changes could violate cost control. The system would account only for general invoices, not commitment invoices. Now the system will account for all money committed to the budget line item when making the validation for negative budget changes.

### Case Number: 00224147

AUTOMATION STEP ISSUE ON THE INVOICE PROCESS

Previously, we displayed 3 "Master Invoice only" mail merge fields (noted in these field descriptions) however, even though they could be added to the mail merge, they were causing

issues with regular commitment invoice mail merges. We've updated the mail merge handling to ignore these fields on merges that are not associated to master invoices.

**Case Number: 00226697**

PCO PROCESS WILL NOT TAKE ACTION, BE DELETED, OR OVERRIDDEN

Previously the system allowed to create a new commitment change item number that already exists in the commitment items if the new item has additional spaces at the end or beginning of the string causing a validation error due to duplicate item numbers in an instance step that is read only and the user cannot modify the items. Now the system works properly.

**Case Number: 00228428**

TAKING ACTION ON PROCESS RETURNS ERROR SCREEN

If the Dynamic Line Items are not included in the layout for a cost process, a null reference exception is thrown when validating the Commitment. Now first check if the Dynamic Line Items are included in the page before validating the Commitment.

## Reports

**Case Number: 00202401**

REPORT FILTERS NOT WORKING

The filter was not working when multiple values selected, the code was fixed following the same approach used when only one value is selected.

**Case Number: 00202691**

LAST LOGON VALUE IN SETUP OR USER LAST LOGON VALUE IN USER DETAILS REPORT INCORRECT

Previously the 'User Last Logon' column contains incorrect table name for report building. To fix this the table name for 'User Last Logon' column was updated to the correct table name.

**Case Number: 00203606**

CHANGE AMOUNT FIELD NOT AVAILABLE WHEN ADDING COMMITMENT CHANGE ITEM

Previously there was Incorrect work of live update for the amount field. This has been corrected.

**Case Number: 00204556**

BI REPORTS CANNOT DISTINGUISH BETWEEN A FORM FIELD NAMED "STATUS" AND THE BUILT IN STATUS OF THE FORM

BI Reports did not distinguish between same named fields (Form fields and built in). Now they will show the Form field with a parenthesis and a counter, for those repeated field names.

**Case Number: 00206243**

VALUE IS ONLY SHOWING FOR THE FIRST MONTH

Previously, if a Matrix Report was made in BI using the Planning Cashflow Data, some reports would not be generated as expected, with values displaying as 0 when there should have been values. This has been corrected and you should now see values as expected.

**Case Number: 00206959**

SCHEDULES AND TASKS REPORT REPLACES TEXT WITH NUMERIC IDENTIFIERS FOR "CONSTRAINT TYPE WHEN EXPORTED

Exported reports now will show constraint type text instead of numbers. Constraint "As soon as possible" will be left as blank, because is the default action.

**Case Number: 00214154**

BI SCHEDULE REPORT - CANNOT SORT BY SEQUENCE NUMBER

Previously, we've found that the Master Activity entity within the Schedule grouping of BI Reports was incorrectly associating data to the Schedule/Tasks data. We've corrected this to ensure that the task data matches up to the associated Master Activity as expected.

**Case Number: 00221437**

MASTER INVOICE ITEM GROUPED BY PROJECT

Previously, the logic for grouping by 'Project Name' column trying get value from incorrect column from database. The issue was fixed and the column name for grouping is now by 'Project Name'.

**Case Number: 00224090**

SUBSCRIBED FORM REPORT WITH INCONSISTENT DATA

Previously a report of submittal items and Form Fields were displaying incorrect data of Date type because it was handled as DateTime, now the system work properly.

**Case Number: 00225771**

REPORT ONE DAY AHEAD ON EXPORT

The "ApprovedByDate" column needs to be treated as a Date, because when you create a Report, this calls the function FromGMT and depending of the Time Zone, the report shows one Day behind what it really is. Changes were made to the following parts of the report creation: - Column type - Criteria and - Grouping Where the date type was changed from "DateTime" to "Date" for the field "ApprovedByDate".

## Schedule

**Case Number: 00206244**

UNABLE TO UPDATE SCHEDULE DETAILS OPTION "USE EXTERNAL SCHEDULER" AFTER APPLYING TEMPLATE

Importing tasks from Excel sheet was causing the system to prevent "Use External Scheduler" update to "No". Tasks may not have duplicated links to other tasks. Now the system prevents this behavior when importing tasks.

**Case Number: 00207042**

UNDOCUMENTED CONSTRAINT TYPE IMPORT VALUES ARE INCONSISTENT WITH DATA FIELD VALUES

Importing tasks will now support spaced and non-spaced text on constraint types for activities. Supported examples: "As Soon as Possible" = "assoonaspossible" (both supported); "Finish On" = "finishon" (both supported); "Start No Later Than" = "startnolaterthan" (both supported). Refer to e-Builder User Guide (Help), to find all possible values.

**Case Number: 00215930**

LOOKUP TABLE FOR SCHEDULE CONSTRAINT TYPE VALUES

BI Reports now will show Constraint Type as text

## User Setup

**Case Number: 00206244**

REPLACING AN ADMIN WITH ANOTHER USER

Previously the system allowed to delete the current project administrator user from the user members or user admin members through Manage groups in Project Participants without having to change the user. Now a user cannot be removed if they are the project admin.