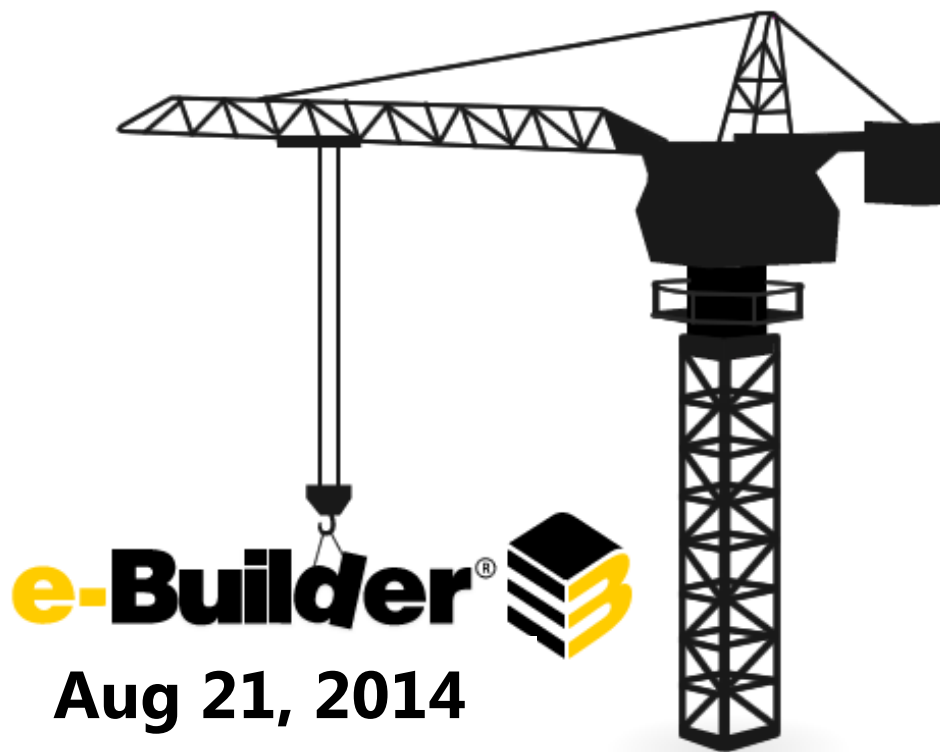


# Maintenance **RELEASE NOTES**



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## About the Aug 2014 Maintenance Release

The e-Builder monthly maintenance releases contain a list of resolved cases for the month.

### 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 Community** – The Ideas section of the e-Builder Community 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. Those with the highest vote totals are noted when forming e-Builder's roadmap. To access the Community, click the arrow next to your username within the banner of e-Builder Enterprise, and then click eB Community.



- **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

- Cost Page Footer Enhancement
- A list of resolved cases

## 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
Aug 10, 2014	1.0	Initial Release
Aug 21, 2014	1.1	Updated to include Cost Page footer enhancement

## Product Enhancement

### Cost Page Footers – Made Dynamic

A change to Cost Page footers in our Q2 Release addressed an issue of displaying inaccurate totals on Cost pages because the system was “double counting” items that used the same budget line item multiple times. The solution implemented removed values (e.g. current budget amount) that were being “double counted” so that only accurate totals remained. However, there are a subset of clients who don’t use the same line item multiple times. For them, the prerelease totals were correct. This enhancement addresses the gap by dynamically displaying Cost Page footers, adding the totals back in these cases but summing only by distinct line items. A tool tip also appears in these cases to provide the user additional context for how the total is calculated.

## Resolved Cases

The following is a list of resolved cases for the month of August. If you have any questions regarding this 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
<a href="#">Bidding</a>	2
<a href="#">Calendar</a>	3
<a href="#">Cost</a>	12
<a href="#">Documents</a>	6
<a href="#">e-Builder Mobile™</a>	1
<a href="#">Forms</a>	3
<a href="#">Planning</a>	1
<a href="#">Processes</a>	9
<a href="#">Projects</a>	1
<a href="#">Reports</a>	9
<a href="#">Schedule</a>	3
<a href="#">Submittals</a>	2
<a href="#">Users</a>	3

## **Bidding**

**Case Number:** 00109928

The Bid Submitted field and Bid Status field on the Invited Bidders tab within the Bid Package Details page were not being updated when an Addendum was added to the Bid Scope of a Bidding Package. The Bid Submitted and Bid Status fields are now properly updated when an Addendum is added to the Bid Scope of a Bidding Package.

**Case Number:** 00110073

Previously, we didn't have proper validation when editing a bid scope item. This gave the user the impression that the Unit of Measurement (UOM) field was being saved when it wasn't since no quantity was selected. This is now fixed and the user must select a quantity in order to save its UOM.

## **Calendar**

**Case Number:** 00108723

When editing an occurrence of an event that is a series, an error improperly occurred on setting for recurring events. Now, when editing an occurrence, the setting for the recurrence does not result in errors.

**Case Number:** 00109356

When using the add attendees button on the attendees tab of an event, the user was able to improperly add duplicate attendees. Now, the add attendees button does not insert the attendee if it already exists in the list of attendees.

**Case Number:** 00110014

Previously, when performing a mail merge for a calendar event, the attendees were not correctly sorting in the printout. Now, the attendees are sorted in the same manner they are on the event details page - Attendee Last Name, Attendee First Name

## **Cost**

**Case Number:** 00103780

Previously, when exporting a forecast, the account codes were displaying as decimal values. This is now corrected and the account codes are displayed as strings values, which prevents truncating any digits.

**Case Number:** 00105415

Custom Funding Rules on Budget Change process line display their funding distributions. All rows in both percentage and amount columns were zero regardless of what was changed. Users will now see the appropriate funding distributions on custom funding rules for budget change processes.

**Case Number:** 00105472

Previously, when trying to import invoices, if there were global custom fields set up to be used with the Invoice and Invoice Items, viewing the Preview step of the Import (with no exceptions) would result in an error. Now, when a user views the Preview step without exceptions, they will correctly see the preview of their import.

**Case Number:** 00105935

When a commitment invoice with attachments to an invoice item is edited, and the documents modal is opened by clicking on the paper clip next to the invoice item and the property link for the document is clicked, an error occurs. Now, the document property page will be displayed without errors.

**Case Number:** 00106155

Previously, when attempting to import a process with a cost integration, if there were global custom fields set up to be used with the cost integration (e.g. Invoice and Invoice Items), viewing the Preview step of the Import (with no exceptions) would result an error. Now, when a user views the Preview step without exceptions, they will correctly see the preview of their import.

**Case Number:** 00107227

Previously the column header row height was being defaulted to 0 pixels when in IE8, so the export did not properly display the row. Now, the column header row height in exports is being set properly (30 pixels) and the rows are correctly displayed.

**Case Number:** 00108164

Previously when exporting a cost summary using a Mac, the footer row was not appearing in the export. Now the footer row correctly appears in the export.

**Case Number:** 00109133

Previously, when trying to import or run a scheduled import that had global custom fields defined for both an entity and its items (ex. Invoice and Invoice Items) the import would fail. This has been corrected to handle the same custom field on both entities, however any XML generated before this fix will need to be regenerated if you are experiencing this issue. Additionally, users may have previously experienced fields being repopulated incorrectly when going from the preview/exception page of an import back to the mapping page. This has also been addressed so that the Item custom fields would not be populated with the value of their parent entity.

**Case Number:** 00109458

The load time of Commitment Invoice Details has been improved.

**Case Number:** 00109810

When viewing and editing any cost entity with unit cost calculations, the footer totals were a penny off due to rounding inconsistencies. The affected entities were the following: View Commitment Invoice

Process, Edit Commitment Invoice Process & Cost Module, View Commitment Change Process, Edit Commitment Change Process & Cost Module, View Commitment Process, Edit Commitment Process & Cost Module. The footer totals on these entities were displayed incorrectly as the rounded sum of the items. Now, the totals are the sum of the rounded items, which now matches up with the total calculations on the entity detail pages like Commitment Details, Commitment Invoice Details, and Commitment Change Details.

**Case Number:** 00109997

Pages with an 'Export to Excel' feature were displaying an error in IE when the Project name contained \' (ex: Test\'s). Now when a Project name contains \' the page will not return an error.

**Case Number:** 00110537

Previously, when attempting to import budget line items, the import button was disabled although there were no exceptions. This is now fixed and budget line items can be imported.

## Documents

**Case Number:** 00105926

Previously, the functionality that tracked how many times an email was viewed when sending files by email or notification was not working properly. Now, this has been corrected and when a recipient views these messages, the count is now properly updated in the Message History.

**Case Number:** 00108134

Previously a user with all necessary permissions was unable to import document custom field values. An error occurred when a user was added to a Document Controller type of role that had view, import, and quarantine permissions. The user was unable to import custom fields to documents even though the role's permission should have allowed them to do so. Now the user in role with import permissions can properly import document custom fields provided they are a project admin.

**Case Number:** 00108806

When attempting to redline a file in e-Builder or open the file in the mobile application, the system would intermittently be unable to locate the file in the file store. Now, the file can be located and opened correctly.

**Case Number:** 00109795

Previously, when a user used the Drag & Drop file upload feature to attach a file to a form comment, when the file was attached the file didn't appear in the grid. Now, the file correctly appears in the grid and appears as attached to the comment when the comment is submitted.

**Case Number:** 00109922

Previously, when a user was copying a file from a project with the document control setting set, the Document Control interface was not being displayed. Now, the Document control page is being shown properly.

**Case Number:** 00109977

Previously, when a folder was public, the public file link was only displayed to superusers. We now show it to all users.

## Meeting Minutes

**Case Number:** 00109466

Previously, when a user edited an occurrence of an event with multiple meeting items, the logged in user who made the change was added as another organizer to the occurrence. Now, the logged in user is not added to the attendees tab and the original organizer remains as the organizer for the occurrence.

## e-Builder Mobile™

**Case Number:** 00113495

Any process type workflow was unable to be viewed on the mobile app. This has been resolved so workflows can be accessed and viewed without error

## Forms

**Case Number:** 00108067

Previously users were unable to delete the contents of a date field. An error was displayed any time the backspace or delete key were pressed in Firefox. When a user opened a form with a date field in the custom fields tab, they would receive an error saying, "Please enter only 0-9, ., /, or - in this field. Dates should be in the format mm.dd.yyyy." in Firefox Now the user is now able to edit and delete the date field using the backspace, delete, and arrow keys. The error will still appear when anything besides an allowed character as stated by the error message is placed into the field.

**Case Number:** 00113507

Previously, when files are attached to a form and do not get saved in any documents folder (setting in form setup for 'Require folder when attaching files' is set to 'No'), the files were not showing in the comments and not showing on the attached files tab. Now, the files are all displaying properly.

**Case Number:** 00114106

Previously, Comments and Attached Files in Forms were not displaying correctly if there were multiple versions of a file. The Attached Files would also show duplicates because of this error. This has been addressed and you should now only see the correct version for the comment that file version was attached to is displayed.



## Planning

**Case Number:** 00107897

Previously, when exporting a Capital Plan to excel, the header and footer sections were not visible on page layout. Now the header footer sections are added to the export per e-Builder standard. For the user to see the date in the export, it must be added to his header/footer rules under setup/admin tools/settings/Export header and footer.

## Processes

**Case Number:** 00104054

Previously, the funding percentage and amounts were not shown for a Custom funding rule in the Budget Change grid when in Edit mode. Now the funding percentage and amounts are displayed for a Custom funding rule in the Budget Change grid when in Edit mode.

**Case Number:** 00106624

Line breaks in the default value of a text block data field were causing errors when hovering over the field in the view or edit page of a layout. Now, the line breaks are removed for the tool tip shown when hovering over the fields on these pages and the errors are resolved.

**Case Number:** 00108168

The minimum lengths in process data fields were not being honored. Now, the minimum length is honored correctly.

**Case Number:** 00109159

Previously, the default value for a data field in a process was allowing bullet points to be saved, which caused errors when previewing layouts with these data fields. Now the bullet points are automatically removed for the default value field to prevent any errors for the invalid characters.

**Case Number:** 00109640

When printing a budget change process in the 'Current View' from the instance details page. The column header for the column 'Change Amount' printed as 'Current Amount'.  
Now, the column headers match as expected.

**Case Number:** 00110637

Previously, if you had two fields with the same name (ex. a Process Data Field and a Global Custom Field associated to Projects, both with the name "Property Name"), on the Add Edit Field Assignment page when setting up an assignment for an action, the Assign to Field dropdown improperly selected the first item with that name in the list, even if it was in the wrong group. Since the Data Fields are listed first, it

would select the "Property Name" item in the Data Fields selection instead of the Project Custom Field section when loading an existing assignment to that field. This issue has been corrected so when you load an existing field assignment, it will select the expected field.

**Case Number:** 00111587

When an invoice item custom field of type date was populated with the same value for each invoice item, the dates were not being saved. Now, when entering the same date across line items for a date custom field, the custom field value will be saved correctly.

**Case Number:** 00111902

Fixed with case – 00109159

## Projects

**Case Number:** 00107257

Previously, styles were not built to standard. Now styles are built to e-Builder style standards.

## Reports

**Case Number:** 00107595

Previously, the name formatting for the column 'Accepted By' in processes was firstName, LastName. Now it is correctly implemented as LastName, FirstName.

**Case Number:** 00107925

Reports that are exported using the "Print View" and that use data grouping no longer show garbled data in the header.

**Case Number:** 00108107

Previously the Matrix report displayed Grand Totals by Status as a numeric value and not as the proper status. Now, the report displays the proper status.

**Case Number:** 00108169

Previously, when logging in as an Admin, the calendar item details page was showing private events in the Meeting Number drop down. Now, Admins can see those private meetings in the calendar.

**Case Number:** 00108399

Previously, the report export was showing numeric values instead of the string values for the priority column in a form log report. Now the report is exported, it is showing the correct values.

**Case Number:** 00108545

The responsible actors column was not populated with appropriate step actors in some cases causing confusion for users. The data fix applied to move all current step actors for processes into the responsible actors column so they will be accurately shown on process reports.

**Case Number:** 00109567

The Process Log Report formula columns did not have the option to select Process Information fields (Accepted By, Date Due, etc...). Now, the Process Information fields are available to the user.

**Case Number:** 00109715

When viewing report history, the popup window displayed erratic behavior that was confusing to the user. If a second report history window was opened, it would display the contents of the previous report history window before updating to the current report history. Roles grids also displayed incorrect information in this case. Now, the Popup window shows a loading icon in place of the previous report's history. Also, Roles grids correctly display which roles are allowed to view the current report. If all users are allowed to view the report, then the allowed roles list will be empty instead of just grayed out.

**Case Number:** 00110557

Previously, when filtering a report on a string column to get only the values that aren't null, null records were still being returned. Now this has been fixed for the 'null' and 'not null' filters.

## Schedule

**Case Number:** 00104251

Previously, when a user was importing a large amount of tasks into schedule via an .mpp file, the page could take a long time to respond. Now a loading icon is displayed to reduce confusion.

**Case Number:** 00109680

Previously, when trying to import a schedule with a ms project file saved as MS Project 2013, the import would show an invalid message thus preventing the user from completing the import. This is now fixed.

**Case Number:** 00110705

Previously, when importing a schedule, the schedule and tasks were not defaulting to Draft status. Now the schedule and tasks are defaulting to Draft status upon import.

## Submittals

**Case Number:** 00106686

Previously, when a user tried to create a bid package and selected the CSI code first, a validation message would show up beneath the Package Name field. Now, when you select the CSI code first, this message will not show until you click Save (only if the Package Name field is invalid).

**Case Number:** 00107314

Previously, when adding a comment to a Submittal Item or a Submittal Package, when you press Add Comment, it would close the modal, then shortly after, open it right back up. This has been changed so that it will just refresh and remain open to show you the comment that was just added.

## **Users**

**Case Number:** 00110047

Previously, the manage membership page would display an error for the specific user. The situation occurred when the initial user was given 'manage user' permissions and the user he was managing was part of a superuser role template that he didn't have the rights to view. Now this has been fixed and we now hide the superuser role templates from regular users with 'manage user' permissions.

**Case Number:** 00113966

The copy user function was not allowing for multiple updates concurrently. Now, the data is being saved properly.

**Case Number:** 00113869

Previously, users were unable to copy new users by copying an existing user. Now a new user can be created without any errors.