



## Q4 2017 Release Notes



**December 21, 2017**

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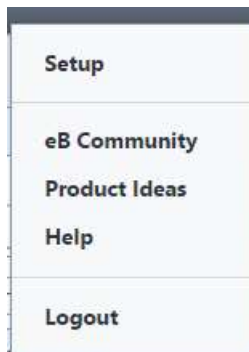
## About the Q4 2017 Release

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
December 21, 2017	1.0	Initial release

## Summary of Features and Impact to Users

Feature	Immediately Available No setup required	Setup Required
New Schedule Interface		✓
New iOS Application	✓	

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

# Product Enhancements

## New Schedule Interface

**Schedule**

Last Modified by Russel Hercules 12.21.2017 08:57 AM

Tasks Details Snapshots (0) History (35)

Working Time

	Task Name	Duration	Start	Finish	% Co...	2017			2018			
						Q2	Q3	Q4	Q1	Q2	Q3	Q4
	Q4 Webinar 4	43 months	05.01.2017	08.14.2020	0							
1	Overall Schedule	860 days	05.01.2017	08.14.2020	0							
1.1	Planning	169 days	05.01.2017	12.21.2017	0							
1.1.1	Field Meeting	1 day	05.01.2017	05.01.2017	0							
1.1.2	Office Scoping	1 day	05.02.2017	05.02.2017	0							
1.1.3	Proposal Finalization	30 days	05.03.2017	06.13.2017	0							
1.1.4	Funding Request	7 days	12.04.2017	12.12.2017	0							
1.1.5	Court Approval	7 days	12.13.2017	12.21.2017	0							
1.2	Design	182 days	12.04.2017	08.14.2018	0							
1.2.1	Kickoff Meeting	1 day	12.04.2017	12.04.2017	0							
1.2.2	Traffic Control Plan Meeting	30 days	12.05.2017	01.15.2018	0							
1.2.3	First Submittal	90 days	01.16.2018	05.21.2018	0							
1.2.4	Final Utility Notification	1 day	05.22.2018	05.22.2018	0							
1.2.5	Second Submittal	30 days	05.23.2018	07.03.2018	0							

The schedule module has been refreshed to a modern, intuitive interface. Users will now enjoy many “desktop like” features such as drag and drop, undo/redo and keyboard controls. With inline editing, users will also have the ability to make changes to multiple tasks, see the immediate impact of any change without needing to save the modifications until they have finished their updates.

### Previewing & Enabling the new Schedule Module

Once the Q4 release is live, users will be start with the old interface but there will be a banner above with a link to preview the schedule. This link will enable the new interface without the ability to save. In order to permanently enable the new interface, the account administrator must contact e-Builder technical support.

Schedule Details (Last updated: 10.04.2017)

**Try the New Schedule**

- User-Friendly Design
- Interactive Gantt Chart
- Optimized Task Management

[Try It Now & Provide Feedback](#)

**Summary** \*Keith's Test Site1 - 12345679

Project Name		*Keith's Test Site1	Project Number		EB00000001
Start	01.03.2011		Baseline Start	01.03.2011	
Finish	12.15.2017		Baseline Finish	12.15.2017	
Duration	90.60mo		Baseline Duration	90.65mo	
Start (including Drafts)	01.03.2011		Finish (including Drafts)	12.15.2017	
Schedule Manager Role	Irma		Start Variance	On Schedule	
Schedule Manager User	Z - e-Builder, GC		Finish Variance	On Schedule	
Use External Scheduler	No				

Schedule Details (Last Modified 10.18.2017 06:23 PM) \*Gain 10

**Schedule Preview**

Modifications to the preview will not be saved and some of the functionality is disabled to protect the integrity of your existing schedule information

- Make informed decisions by visualizing how task changes will impact the overall schedule
- Drag and drag grid elements with ease, configure visible columns, and easily manage task details using the new right click menu or directly add information inline

[Exit Preview](#)

Task ID	Task Name	Duration	Start	Finish	Mon 31 Mar 2003				Mon 07 Apr 2003				Mon 14 Apr 2003				Mon 21 Apr 2003															
					M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S
1	Design and entitlement pe...	0 days	04.04.2003	04.04.2003																												
2	Notifications test	30 days	01.23.2014	02.26.2014																												
3	Construction kickoff meeti...	8 weeks	05.01.2013	06.14.2013																												
4	Development Planning, s	56.25 days	12.14.2012	02.14.2013																												
4.1	Determine Licensure...	30 days	12.14.2012	01.16.2013																												

## Interactive Gantt and Tasks

Users will be able to select the gantt bars in a task to update:

- Duration
- % complete
- Task Relationships
- Start states

Users will have the ability to select one or many tasks, using drag and drop functionality to dynamically adjust:

- Work Breakdown Structure (WBS)
- Sequence

## New Schedule Toolbar

The new schedule has simplified the access to key functionality and has provided new tools to improve gantt control and gantt navigation.

### Schedule

Last Modified by Russel Hercules 12.21.2017 08:57 AM

The screenshot displays the 'Schedule' interface. At the top, there are tabs for 'Tasks', 'Details', 'Snapshots (0)', and 'History (35)'. Below the tabs is a toolbar with various icons and labels: 'Add Task', 'Outdent', 'Templates', 'Critical Path', 'Undo', 'Redo', 'Import', 'Export', 'Snapshot', 'Send', 'Expand', 'Collapse', 'Previous', 'Next', 'Toggle', 'Reset', 'Out', 'In', 'Fit', and 'Working Time'. The main area contains a table with the following columns: 'Task Name', 'Duration', 'Start', 'Finish', and '% Co...'. The table lists tasks such as 'Q4 Webinar 4', 'Overall Schedule', 'Planning', and 'Field Meeting'. To the right of the table is a Gantt chart showing task bars for 'Mon 01 May 2017'.

Task Name	Duration	Start	Finish	% Co...
Q4 Webinar 4	43 months	05.01.2017	08.14.2020	0
1 Overall Schedule	860 days	05.01.2017	08.14.2020	0
1.1 Planning	169 days	05.01.2017	12.21.2017	0
1.1.1 Field Meeting	1 day	05.01.2017	05.01.2017	0

## New Print Controls

In the new schedule interface and in any “Schedule and Task” report type, e-Builder now supports print controls. In the Schedule module it can be accessed from **actions section of the toolbar > Export > PDF**.

The screenshot shows a task list with columns for Task Name, Duration, and Start. A 'Print settings' dialog box is open, allowing users to configure print options. The 'Export' button in the task list is highlighted with a red box, and a dropdown menu shows 'PDF' selected. The 'Print settings' dialog includes options for Schedule range (Complete schedule), Select columns ([no title], Task Name, Duration, Start, Finish, %), Rows range (All rows), Control pagination (Multiple pages (vertically)), Paper format (A4), Orientation (Portrait), DPI (dots per inch) (72), and Show header (checked). Buttons for 'Print' and 'Cancel' are at the bottom of the dialog.

In the Reports module, the gantt print can be accessed by running a schedule and task report, then selecting Gantt Chart.

The screenshot shows the 'Q4 Webinar Projects (For Gantt View)' interface. A red arrow points to the 'Gantt Chart' button in the top right corner. The main area displays a Gantt chart showing task durations across multiple years from 2016 to 2023. The chart includes a table with columns for Project Number, Sequence Number, Task Name, Start, Finish, Duration, % Compl., and Bas. The Gantt chart shows tasks for 'Q4 Webinar 4', 'Q4 Webinar 2', and 'Q4 Webinar 3' with their respective durations and completion percentages.

### Configurable Columns

The schedule interface leverages configurable columns which enable a user to personal their specific fields to be visible. The configuration is persistent and unique to each user.



## Schedule

Last Modified by Russel Hercules 12.08.2017 03:14 PM

Tasks | Details | Snapshots (1) | History (70)

Tasks | Actions | Navigate | Baseline | Zoom | Calendar

	Task Name	Start	Finish
	Q4 Webinar 6	03.01.2018	01.02.2020
1	Overall Schedule	03.01.2018	01.02.2020
1.1	Planning	03.01.2018	03.21.2018
1.1.1	webinar approval	03.01.2018	03.01.2018
1.1.2	Funding Request	03.02.2018	03.12.2018
1.1.3	Court Approval	03.13.2018	03.21.2018
1.2	Study	03.22.2018	01.02.2020
1.2.1	Kickoff Meeting	03.22.2018	03.22.2018
1.2.2	Drainage Meeting	03.23.2018	05.03.2018
1.2.3	Alignment Meeting	05.04.2018	07.26.2018
1.2.4	ROW Meeting	07.27.2018	08.09.2018

Context menu options:

- Add new column...
- #
- % Complete
- Baseline End
- Date
- Baseline Start
- Date
- Constraint
- Constraint date
- Critical
- Duration

For each column, the users will be configure:

- Column visibility
- Column width
- Column position

### New Task Modal

In addition to inline task editing, users will also be able to edit task details by right clicking on the task and selecting the Task Details modal.

Dashboard Projects Planning Forms Processes Documents Calendar Contacts Bidding Cost Schedule Reports Time Tracking Setup +

### Schedule

Last Modified by Russel Hercules 12.08.2017 03:14 PM

Tasks Details Snapshots (1) History (70)

Outdent Templates Undo Import Snapshots  
Add Task Indent Critical Path Redo Export Send

Task Name	Start
1.2.11 Final Study Report	08.30.2018
1.2.12 Court Approval of Study	09.10.2018
1.3 Design	09.19.2018
1.3.1 Kickoff Meeting	09.20.2018
1.3.2 Traffic Control Plan	10.20.2018
1.3.3 First Submittal	01.2018
1.3.4 Final Utility Notific	07.2018
1.3.5 Second Submittal	08.2018
1.3.6 Final Submittal/Se	19.2018
1.4 Bid Phase	01.2018
1.4.1 Advertise to Bid/D	31.2018
1.4.2 Bid Opening	03.01.2018 03.08.2018

#### Task Editor

General Predecessors Resources Advanced Comments (0) Custom Fields

Name: Kickoff Meeting

Description: "Segoe UI" B I U T T

% Complete: 0%

Duration: 1 day

Dates: Start: 09.19.2018 Finish: 09.19.2018

Baseline

Ok Cancel

Task Details

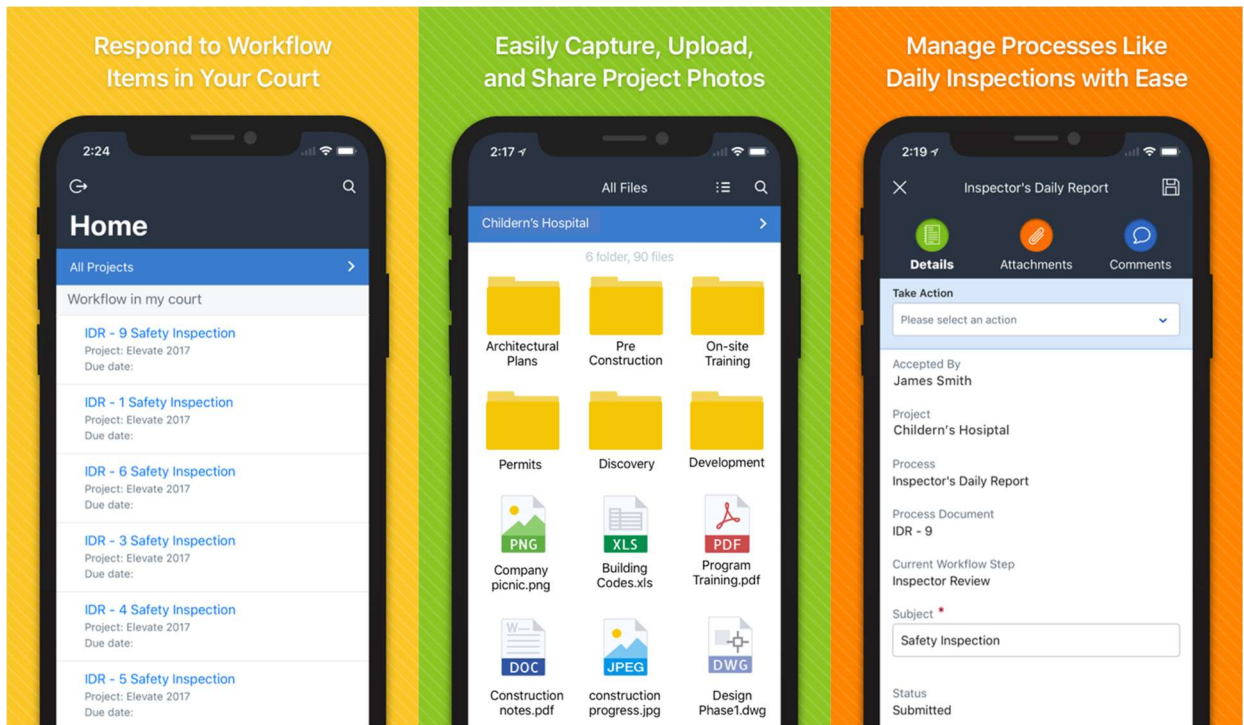
https://beta-app.e-builder.net/da2/Schedule/ResourceLoadedScheduleDetails.aspx?PortalID={4be43427-a6f3-4601-b647-e6c28cdc2284}#

## New iOS Mobile Application



We're excited to announce that our new iOS mobile application has been released to their App Store! iPhone and iPad users are going to be able to download our redesigned mobile application through the iTunes store. This is a brand-new application and is not replacing the legacy version of the application. Both applications can co-exist on your device.

Users of e-Builder will easily navigate through Documents and Workflows from their mobile device with faster performance and better usability than the previous application.



## 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
Bidding	1
Cost	6
Documents	5
Planning	1
Processes	4
Projects	2
Reports	3
Setup Admin	2
Time Tracking	1
User Setup	1

## Bidding

### Case Number: 206518

CONSTRUCTION CODE DOES NOT APPLY WITH TEMPLATE

Previously, after the template is applied, the construction code that was chosen in the template, is not selected in the bid scope due to that it was missing that part in the code. Now, the system works properly.

## Cost

### Case Number: 229048

PROJECTS CANNOT BE SELECTED FROM THE COST TAB

Previously, some projects were not showing in the project drop down when go to Cost Tab. This was happening for users who were in account level roles with cost permissions. We've corrected the query that pulls this list, and the appropriate projects will display as intended.

### Case Number: 232261

TOTAL RETAINED INVOICE = \$0.0

The total for amount retained was not being displayed in the items grid footer on the Commitment Invoice details page for an invoice. Now, the total amount displayed will be consistent with the amount displayed in the summary section.

### Case Number: 239740

MAIL MERGE NOT WORKING WITHIN COMMITMENT DETAILS

Previously, Mail Merge print option was not working from Actual Costs Tab within Commitment Details. The issue was happening because the system was not able to correctly get the list of selected invoices. Now, Mail Merge option will be available to print.

**Case Number: 240289**

USER CANNOT APPROVE BUDGET CHANGES DIRECTLY IN COST MODULE

Fixed a problem where users with budget changes approval permissions were unable to approve budget changes.

**Case Number: 257460**

COMMITMENT CHANGE AMOUNT IS NOT ADDING TO CURRENT COMMITMENT

One of the Commitment change amount was not reflecting in the current commitments total amounts, so updated the corresponding cost and commitment tables to show the appropriate amounts.

**Case Number: 257693**

DUPLICATE INVOICES WHEN IMPORTING

Imported invoice file received generic E-builder error. When Importing a second time resulted in duplicated invoices. Now, if the file is reprocessed in the same session a message will be given.

## Documents

**Case Number: 214620, 221152, 232038, 239175**

ERROR PUBLISHING WITH REDLINE TOOL

Documents failed to load when scrolling down many pages showing only the spinning wheel. This has been fixed and performs as expected

**Case Number: 236884**

DOCUMENT STRUCTURE DUPLICATED AFTER TEMPLATE WAS APPLIED

The system duplicated folders after a template was applied due to that two servers picked up the record at the same time and processed them. Code fix to prevent this to happens in the future and data fix to delete the duplicate folders.

## Planning

**Case Number: 236868**

PLANNING ESCALATION PERCENTAGES

Previously when an escalation percentage was set to future years it wasn't being taken into consideration, now the percentage is used to calculate the budget.

## Processes

### Case Number: 231650

EXCEPTIONS WHEN IMPORTING A SOV TO THE SOA PROCESS

Previously, the import of a SOV was failing due to an incorrect handling of the master commitment items when the account level cost is enabled. Added validation also if the user enters an incorrect account code or master commitment item, this is possible copy and pasting any value in the cell. Now, the system works properly

### Case Number: 238204

USING CONTAINING TEXT FIELD IS NOT RETURNED RESULTS THAT EXIST

Performing search with a string that contains numbers followed by period and numbers did not produce any search results when there were valid data. Now, search will return correct results with '.' in query string.

### Case Number: 241431

PROCESS ISSUE CANNOT COMPLETE A PA PROCESS ON PROJECT

A specific client was unable to submit a process due to an unknown data issue with a Master Commitment Line Item. We added the missing Line Item to the database, and now the process is able to continue.

### Case Number: 257367

PROCESS\_SAP MAPPING

Previously, our oData service was not populating the MappedCostID property for processes with a cost integration for Dynamic Cost. This caused users to not be able to join to the appropriate cost entities. This should now populate appropriately for Dynamic Cost processes.

## Projects

### Case Number: 228608

E-BUILDER ERROR WHEN SELECTING EDIT ON A PROJECT DETAILS

Previously, when you import a project from a file, the range of date was not controlled, so if you entered an incorrect date you had an error when editing the project. Now, if you enter an incorrect date you will have a validation control to prevent the entry of an out-of-range date.

### Case Number: 239817

UNABLE TO SEND A PROCESS BACK TO REVISE

Previously, our Rich Text fields would allow pasting HTML elements from our own system into them. This is fine, except that on some validation, these elements would be picked up by the system, and it would think it needs to validate those. Due to this, we will now strip out certain attributes of HTML elements, as to not confuse them with the real elements and real validation values.

## Reports

### Case Number: 236093

REPORT IS NOT SHOWING ALL RESULTS UNLESS EXPORTED

Removed top 10000 from inner join which caused the results to be incorrectly truncated.

**Case Number: 239481**

ATTEMPTING TO EXECUTE A REPORT PRODUCED A PROJECT PERMISSION ERROR MESSAGE.

Attempting to execute a report produced a project permission error message. This was due to the fact that the project drop down was populated with projects for the report run as user for which the logged in user was not a member. Now, the report will execute and give results.

**Case Number: 239948**

GROUPING REPORT BUDGET FUNDING BY FISCAL YEAR

The user was unable to run the report when funding year is selected for grouping option, because the report grouping query was been sent incorrect in back end, but now updated the query to fetch the appropriate results.

## Setup Admin

**Case Number: 257484**

EXCEPTIONS FROM SCHEDULED TASK HAS UNUSUAL ERROR MESSAGE "THIS SQLTRANSACTION HAS COMPLETED: IT IS NO LONGER USABLE."

The custom general invoice import failed for the client when there was system latency which resulted in an execution time out. The scheduled task can be re-executed with the failed rows in the excel file. Diagnostic logging will be added to the custom work to identify what operations are affected when there is latency.

**Case Number: 237968**

SCHEDULED TASK FAILED

Custom Scheduled task for Commitment Invoice Export fails intermittently when retrieving cost data. Data fetching retries and execution optimization was done to mitigate the issue.

## Time Tracking

**Case Number: 233011**

NEGATIVE HOURS ARE SHOWING UP WRONG IN TIME TRACKING MODULE

The problem was that when the user saved negative hours in the Timesheet the number shown changed. Now the time stays as it was typed.

## User Setup

**Case Number: 236246**

NOT ABLE TO DISABLE/DELETE SUMMARY NOTIFICATION

When trying to delete summary notifications the functionality did not work. This was as a result of inconsistent data for summary notifications. The data will be corrected. Now, notification will be can deleted without errors.