



# Maintenance Release Notes

**AUGUST 16, 2019**

This document is intended only for the use of Client personnel under the terms of the NDA on file. It may not be distributed outside the client organization without previous authorization from e-Builder.

©Copyright 2019, e-Builder, Inc

## Table of Contents

What's New.....	2
Reports.....	2
New Resource Management Fields Added to Standard Reports.....	2
Bid Portal.....	3
Invitation Document Information Displayed.....	3
Submittals .....	4
Admins Can Independently Turn Off Hidden Comments and Attachments in Submittal Settings.....	4
Hidden Comments and Attachments Can be Made Visible Only to the Review Team.....	5
The "Reviewers" Link Remains Visible After the Submittal is Returned to the Contractor .....	6
Resolved Cases.....	7
Business Intelligence .....	7
Companies .....	7
Cost .....	7
Custom Development .....	8
Documents .....	8
Forms .....	9
Online Help .....	9
Processes/ Workflow .....	9
Reports.....	10
Scheduled Task Engine.....	11
Schedules .....	11
Settings.....	11
Your Opinion Matters .....	12

## What's New

e-Builder enhancement releases include improvements to targeted areas of product functionality and usability enhancements that increase the ease-of-use of current features and functions across the entire product. The following is a list of enhancements included in the past month. If you have any questions regarding this release, please contact e-Builder [Technical Support](#).

## Reports

### ***New Resource Management Fields Added to Standard Reports***

The following Resource Management fields (Task and/ or Schedule) have been added to standard reports and account-level views.

- Actual Work
- Remaining Work
- Projected Work
- Invoiced Work
- Remaining Invoice Work
- Actual Cost
- Remaining Cost
- Projected Cost
- Invoice Cost
- Remaining Invoice Cost
- Scheduling Mode
- Manually Scheduled
- Calendar Name/ID (name because it could be deleted later)
- Assigned Resources

The following report types have also been updated:

- Schedule and Tasks
- Schedule

The following account views have been updated:

- Schedule
- Tasks

Added the new fields to the following standard report wizard steps:

- Standard Reports - Column List

- Standard Reports - Groupings and aggregates
- Standard Reports - Filters
- Standard Reports - Configure Columns
- Standard Reports - Formula Columns

All output types have also been updated:

- Export
- Print View
- Scheduled Reports
- Report Results

Added the new fields to the following Account Views areas:

- Account View - Schedule & Task - Column drop-downs
- Account View - Schedule & Task - Filter drop-downs
- Account View - Admin Setup - Column drop-downs
- Account View - Admin Setup - Filter drop-downs

## **Bid Portal**

### ***Invitation Document Information Displayed***

The Invitation Documents page on the Bid Portal now clearly displays the Version number of each document and the associated Date/Time of that version. This clarifies questions between the Bid Manager and Bidders about the most current documentation.

Invitation Documents Page


Package Invitation      Response Form      Q&A Board






Accepted      Decline

05.06.2019 5:58 PM (GMT-05:00) Eastern Time (US & Canada)

Bid Info      **Invitation Documents (5)**      Addenda (1)

Hide All | Show All

Click this icon  to download files. Clicking the icon next to a folder will download all files and subfolders within it.

File / Folder Name	Uploaded on	File Size
 Bids - Outgoing (4)	08.15.2018 9:38 AM	
 Addendum 001 (1)	05.07.2019 11:14 AM	
 A-206 Floor Plan.jpg Version 1	03.28.2019 1:20 PM	0.00 bytes
 A-101.jpg Version 2	03.28.2019 12:29 PM	131.88 KB
 A-107 Stevens Floor Plan.jpg Version 1	08.15.2018 9:39 AM	63.55 KB

*Document version and uploaded date/time on Bid Portal matches the internal team member view of the Documents module*

## Submittals

### ***Admins Can Independently Turn Off Hidden Comments and Attachments in Submittal Settings***

Previously, to discontinue using the Hidden Comments and Attachments submittal feature, account admins had to make a request for an engineering fix. Now admins can independently turn off this feature.

**CAUTION:** Turning this feature OFF results in ALL hidden information for all past and present projects in the account to be visible by every team member who has View Submittal permissions and access to the project.

Forms Documents Calendar Contacts Bidding Cost Schedule Reports Setup +

### Submittal Settings

Account Admin can independently turn setting on and off

Save Cancel

Allow System Generated Submittal Dates to be Modified ?

In Review

- Allow comments and attachments to be hidden
- Restrict view of Hidden comments to only submittal coordinators and reviewers of submittal items
- Changes Private comments to Public (visible) when shown in review

#### Manage Required Fields for Submittal Items

Field Name	Description
------------	-------------

### **Hidden Comments and Attachments Can be Made Visible Only to the Review Team**

Previously, any team member with the View Submittals permission could view hidden comments and attachments, which are intended for coordination within the Design Review team only. This can be a problem when team members who have View access solely to download final submittals or monitor progress (i.e., field staff, executives – purple icon on sketch) unintentionally have visibility into unofficial review comments.



A new submittal setting has been added, which only applies to accounts that have enabled the “Allow Comments and Attachments to be Hidden” setting. When this new setting is turned on, hidden comments and attachments are only visible to the Design Review team – which is defined as all project submittal coordinators and team members who have received a Forward for Review action.

**NOTE:** Any team member with the View Submittals permission including external team members can potentially be a recipient of Forward for Review, and therefore be pulled into the Design Review team.

When using the hidden comments feature, the best practice is to have the new restriction setting turned on so that only team members deliberately included in the review can see hidden items.

Forms Documents Calendar Contacts Bidding Cost Schedule Reports Setup +

### Submittal Settings

Save Cancel

Allow System Generated Submittal Dates to be Modified

In Review

- Allow comments and attachments to be hidden
- Restrict view of Hidden comments to only submittal coordinators and reviewers of submittal items
- Changes Private comments to Public (visible) when shown in review

#### Manage Required Fields for Submittal Items

Field Name	Description
------------	-------------

**The "Reviewers" Link Remains Visible After the Submittal is Returned to the Contractor**

Previously, the Reviewers link on the submittal register disappeared after a submittal was returned to the construction team. As a result, valuable information about the review cycle was more difficult to ascertain. Now the Reviewers link will continue to display on submittal items.

Submittal Register for [dropdown]

Filter Submittal Items

Group By: None Page 1 of 1 Show 25 per page

Buttons: Send to Sub, Add to Package, Add Item, Delete, Import

*Submittal items returned to Construction continue to display Reviewers link with reviewer names, due dates, and completion*

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	REVISE create by GC	1	0	1-01200-0			Bid Submittals	AAN		Susan GC *Parker	Reviewers
	REVISE - by GC as SC	2	0	2-01300-0			Operation / Maintenance Manual	AAN		Susan GC *Parker	Reviewers
	Revise create by Sub A	3	0	3-01292-0			As-Builts	RAR		Susan GC *Parker	Reviewers

Reviewers for Information on Asbestos Waste Trasn

Reviewer	Requested By	Date Requested	Date Due	Review Completed Date
Susan Design *Parker	Susan PM *Parker	01.31.2019	02.12.2019	01.31.2019
anpaddock@gmail.com	Ashley Paddock	06.04.2019	06.28.2019	

## Resolved Cases

The following is a list of resolved cases for the past month. If you have any questions regarding this maintenance release, please contact e-Builder [Technical Support](#).

### Business Intelligence

Case #	Resolution Notes
326881	The Drag and Drop setting for BI Reports has been restored.

### Companies

Case #	Resolution Notes
328047	Optimized the query for a regular user when finding all projects having invoices for a particular company.

### Cost

Case #	Resolution Notes
313074	Resolved an error that appeared when importing a project level invoice against a Master Commitment. Previously, if the Amount this Period was not exactly equal to the Qty this Period x Unit Cost it would cause an exception. Now, if everything else on the item is correct, it no longer produces an exception/warning.
314545	Adding an invoice in Received, Approved or Paid status to the full amount of the commitment and the budget remaining amount to be invoiced was performing an invalid cost control validation. This issue is faced with decimal places amounts. Now, the system works as expected.
316448	Resolved an issue where commitments could not be closed due to a decimal place rounding error. Importing Commitment Invoices will now round Invoice Item amounts to 2 decimal places; Item Unit Costs and Item Quantities will be rounded to 4 decimal places



- 322469      Optimized the commitment import code to insert custom field values in bulk and to get all custom field definitions at one time.
  
- 322469      Optimized the commitment import code to insert custom field values in bulk and to get all custom field definitions at one time.
  
- 322700      Previously, when the "Set-up Cash Flow" button was clicked, it wasn't disabled, and if a user clicked more than once it created multiple requests resulting in the same Budget Line Item being repeated. Now the button is disabled until the request is processed to avoid duplications.
  
- 325790      Resolved an issue that caused invalid exceptions while importing funding sources. The consideration cost preferences have been reset for each invoice.

## Custom Development

Case #	Resolution Notes
318241	Resolved an issue with duplicate sequence numbers.
327895	Previously, the report threw an unhandled exception because of a missing process. Now, the report will throw a handled exception and an applicable error message will be displayed to the user mentioning that the process type required to run the report was not found.

## Documents

Case #	Resolution Notes
317215	The default destination folder defined for Submittals was not being respected when attaching files using Chrome, Firefox and Edge browsers. This issue has now been resolved.
321372	Resolved an issue that did not allow the user to change the folder path when the root folder path is different than the process instance path.
322556	Resolved an error that appeared when attempting to create a Bluebeam session through e-Builder.

## Forms

Case #	Resolution Notes
324472	If the author of a form was also listed in the CC section, their email was incorrectly removed from the email distribution list. Now the author will receive the email notification as expected when included in CC.

## Online Help

Case #	Resolution Notes
	Resolved an issue that prevented the correct context-sensitive Online Help from being displayed for various pages of the application.

## Processes/ Workflow

Case #	Resolution Notes
327298	A code change was performed to fix the way budget control violations were being processed on approved commitments. Users can now change Budget Code line items on an approved PO process without receiving violations on the process instance in question.
326209	If a layout is deleted from a process step, the process would not publish, but was not giving a specific error message. This situation will now let the user know which step is missing a layout.
325621	Past actors will not get notified on private comments if they do not have permissions to view private comments.
324838	The allowance item was excluded from the list to validate totals against master commitment. This prevented the process from moving forward to the next step. This issue has now been resolved. Now the allowance items are included and the totals don't violate rules.

- 324563 Previously, on a Commitment process in a "Read-only" layout, the Master Commitment could be changed. That is no longer possible, and the Master Commitment is locked.
- 322134 Resolved an issue that prevented external team members from receiving notifications of a Request for Comment when the subsequent step was automation.
- 322043 Required fields inside dynamic grids were preventing users from accepting or declining the process action. The validation of the required fields will now take place after the Accept/Decline action.
- 318141 When a comment is requested while taking an action, it will get logged into the process instance history.
- 308699 When using either Import Processes or Scheduled Tasks to "Import Invoices" for Commitment Invoices with a Commitment using Unit Cost and where the Commitment has a Commitment Type for PayApp, check any provided value for Amount this Period column against the values for the provided column Quantity this Period multiplied by the parent Commitment's Unit Cost for the corresponding Commitment Item. If the provided value does not match, the returned exception message should now have proper English grammar.

## Reports

Case #	Resolution Notes
323137	Resolved an issue that prevented report formula columns from functioning properly.
325507	Resolved an issue with displaying names containing special characters in Reports. Since different language have different character sets, charset=utf-8 was added to ensure that the exported HTML/ Excel files display correctly.
326621	When exporting the report, the code was adding the Late label even when there was no entry for the Finish Variance. this issue has now been resolved.
327206	Resolved an issue that removed leading zeros in the Print View of Reports. Added the Excel-String CSS class to the exported Print View Report so that the spreadsheet editor handles all string values as such, even if they only contain numeric characters.

- 327291 Reporting on process status (OnHold) was not working. The filter query was generating an extra AND keyword when adding the regular status filter. Another logic control was added to prevent the error from happening.
- 328336 Resolved an error that was displayed when trying to view a BI Report on the Dashboard.

## Scheduled Task Engine

Case #	Resolution Notes
327388	Resolved an error that prevented automated tasks from functioning properly.

## Schedules


Case #	Resolution Notes
328253	Resolved an issue that prevented schedule snapshots from loading for accounts with Resource Management enabled and when the schedule does not have a calendar named "Standard".
313716	Multiple constraint violation windows were displayed when updating the schedule using an import file. This issue has now been resolved and only one constraint violation window is displayed.

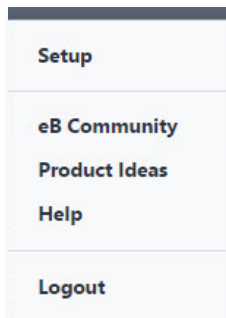
## Settings

Case #	Resolution Notes
318173	Resolved an issue that caused announcements to expire four hours before the set expiration time. Fixed the issues with insertion of the announcement and set the query to fetch the announcements by account.

## 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. The number of votes is one of the factors considered 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).