Release Notes

JULY 17, 2020

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What’s New

The following is a list of enhancements included in the release. If you have any questions regarding this release, please contact e-Builder [Technical Support](#).

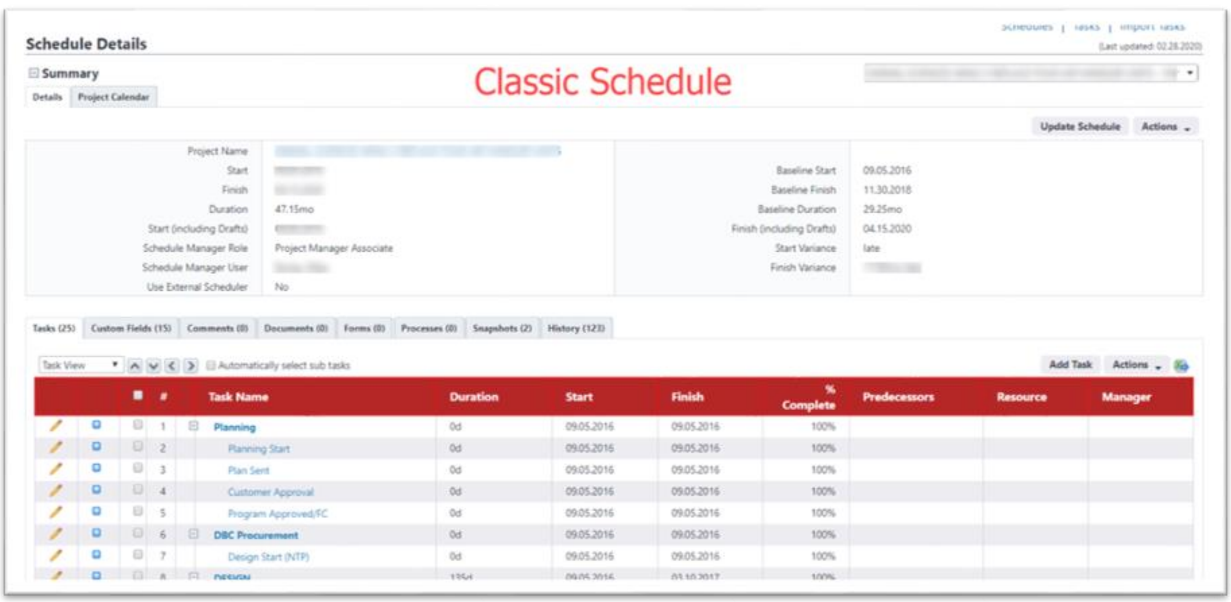
Schedule

Retirement of the Classic Schedule Interface

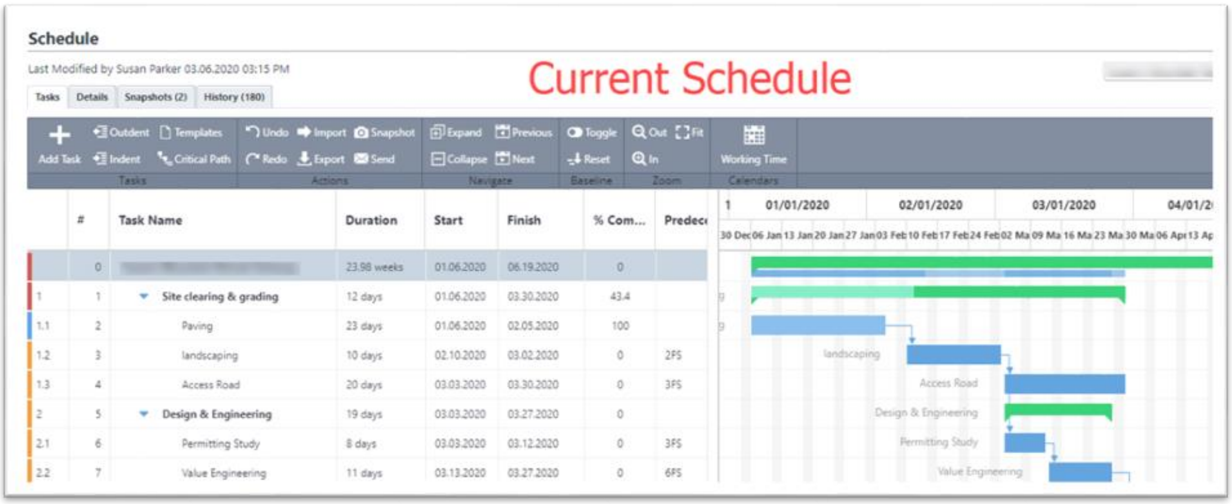
The Classic Schedule User Interface has been discontinued with this release. The current user interface has the same functionality, but the user interface has been significantly enhanced from the Classic version.

Please contact e-Builder [Technical Support](#) if you need assistance with training or custom development regarding this change.

This change has no effect on customers using the Current Schedule interface.



Classic Schedule User Interface

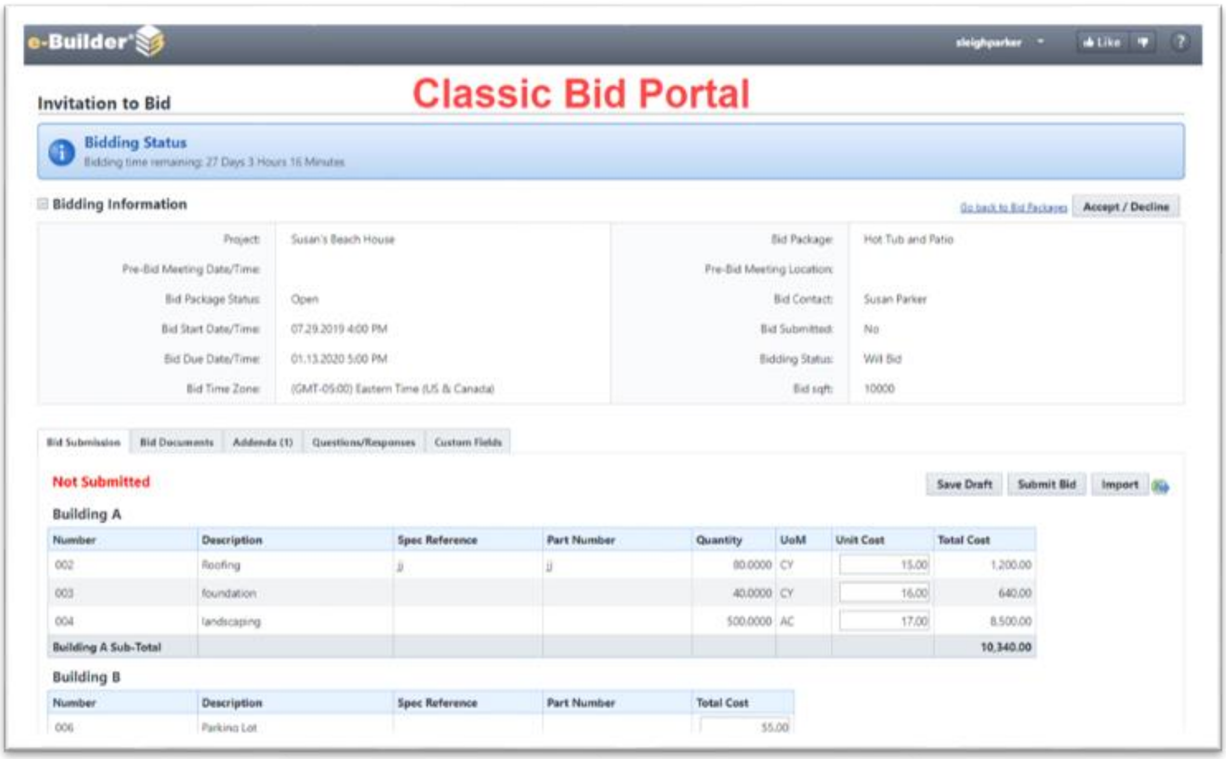


Current Schedule User Interface

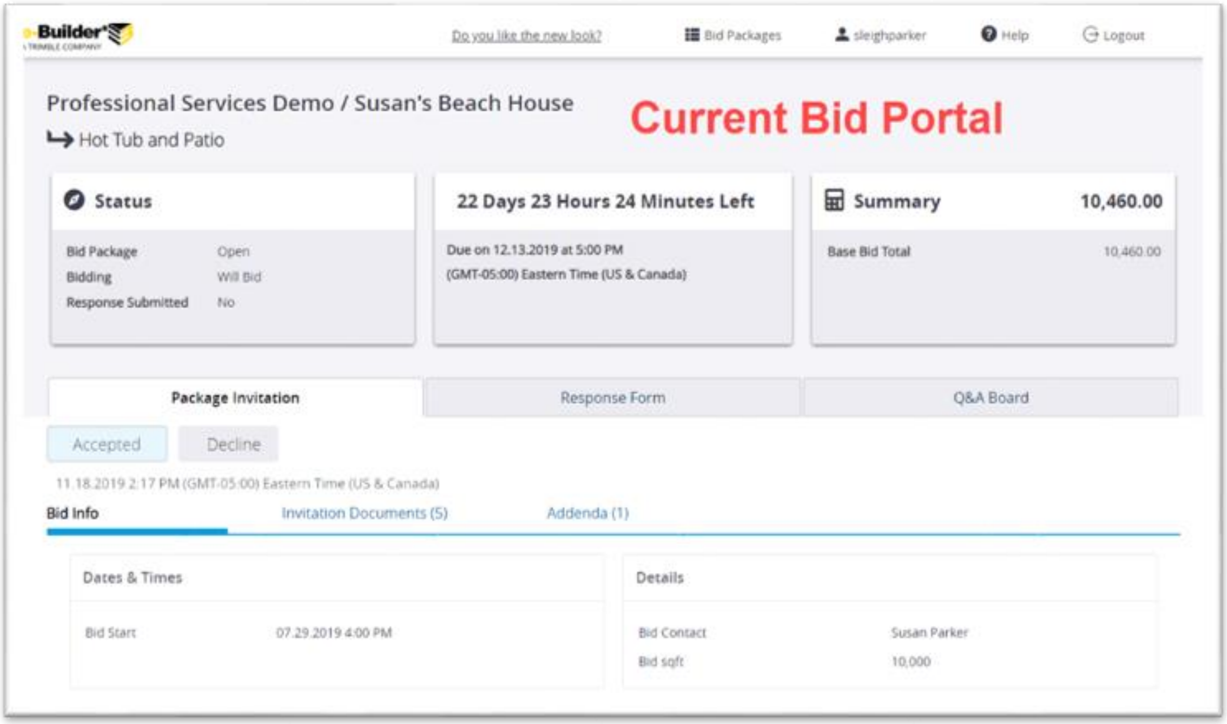
Bid Portal

Retirement of the Classic Bid Portal Interface

The Classic Bid Portal Interface has been discontinued with this release. The current Bid Portal user interface has the same functionality, but the user interface has been enhanced from the Classic version.

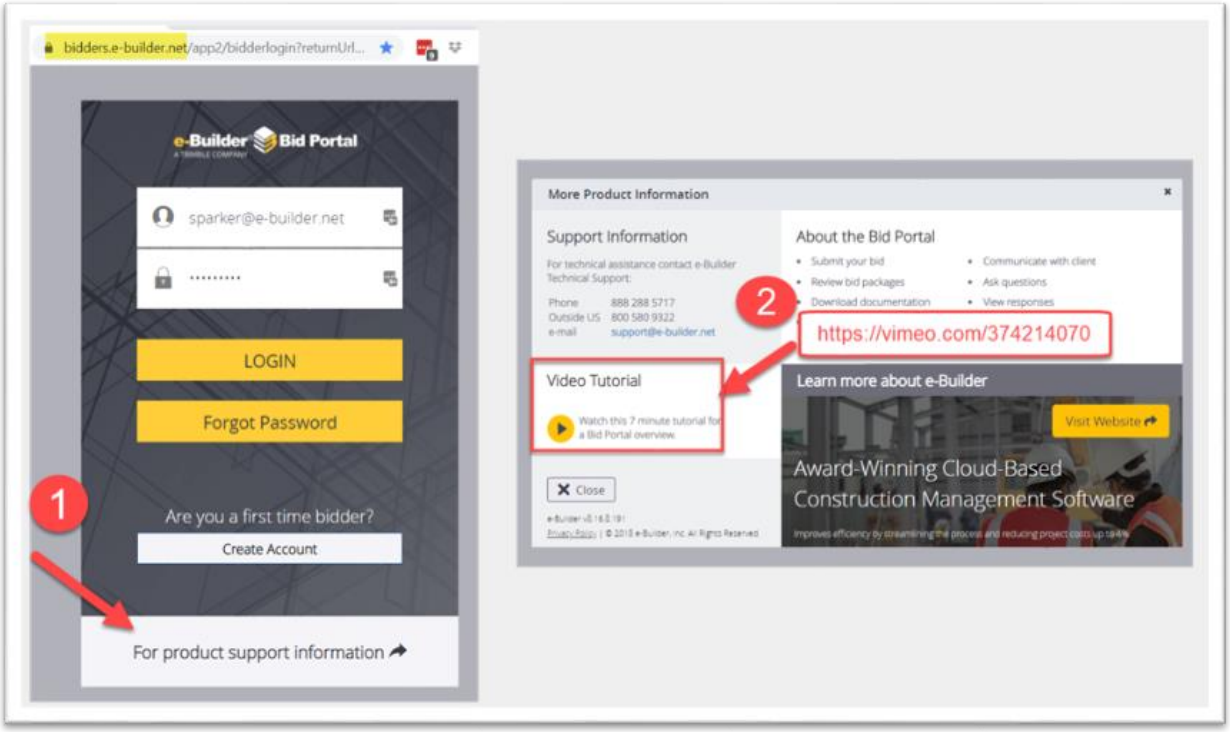


Classic Bid Portal User Interface



Current Bid Portal User Interface

To access a video tutorial about the latest version of the Bid Portal interface, click the **For product support information** link on the Bid Portal login page. Click the **Video Tutorial** link to watch the video overview.



Access the Bid Portal Video Tutorial

Please contact e-Builder [Technical Support]() if you need assistance with training or custom development regarding this change.

This change has no effect on users working with the Current Bid Portal interface.

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.

API

Case #	Resolution Notes
360100	Resolved an API connectivity issue using Power BI and Excel.

AppXchange

Case #	Resolution Notes
362608	Added code to convert and display the "Approved by Date" value to the user's time zone on commitment invoices.
365204	When importing commitment changes using the API, invalid project identifier values will be allowed to pass through to the standard import where it will be validated. The exception file generated is saved in the specified folder in the Documents module with the error message stating the failure.
365204	An exception file should have been created when an incorrect project number was sent. This issue has been resolved. An exception file is now generated and saved in the Documents module with the error messaging stating the failure.
367565	Added a new lookup function to find projects by identifier while excluding deleted projects.

Bidder Portal

Case #	Resolution Notes
370524	Resolved an error with the Bidders Portal that prevented users from recalling and resubmitting their bids.

Bidding

Case #	Resolution Notes
365133	Some bid submissions were missing documents, even though they were required for successful bid submission. Added validation of required custom fields to prevent bid submission if one of the required fields is empty or if the object id does not exist in documents.
368095	Made performance improvements to mitigate against inconsistent processing upon bid submission.

Business Intelligence

Case #	Resolution Notes
365443	Resolved a time zone issue with the formula for time in the BI reports. The Reports now display the time in the user's time zone as expected.

Companies/ Contacts

Case #	Resolution Notes
365676	The user is now able to filter in the Manage Projects page by the "Company" and "Company On Project" Custom Field types.

Cost

Case #	Resolution Notes
314900	Resolved an issue where the browser crashed after trying to update cashflow.
327630	When using timesheets, there was a rounding error where the calculated amount (based on hours & hourly rate) was not rounded up correctly. Updated the code to round it up so the actuals approved match the total invoice amount.
349688	If a submitted draft instance failed, the system would re-submit it. To avoid duplicates, it would increment the counter. This resulted in invoice numbers with '-2' appended to the end. This issue has been resolved.

356362	Users were getting a validation message for funding rules when they were trying to void the master invoice. This issue has been resolved. Users should now be able to void the master invoice.
358937	When submitting a project level invoice from the Cost module, it will now correctly accept the Approved and Paid dates entered by the user, regardless of whether the commitment is tied to a master commitment.
359537	When a project invoice is submitted, it withdraws monies from the project level funding source; however, if the project funding is linked to account funding, then the invoice was also withdrawing from account level funding. This "double-dipping" was causing the account level funding balance to go under since monies were already allocated to the project level funding from this account level funding. When project invoice was submitted, it should not have taken money out of account level funding when project level funding had a balance. The code has been updated to correct this behavior so that if there is money on project level funding, it won't affect account level funding.
360182	Resolved an issue where a commitment change could not be updated due to a validation message for an allowance item.
362815	Resolved an issue with auto-generating the Master Commitment Item Number.
368228	A generic error was received when trying to edit some commitment invoices. Updated the code to validate the Date Received date with a minimum date while importing the invoice.
368502	An error message will be displayed when a user tries to delete a commitment type which is in use.

Dashboards

Case #	Resolution Notes
346782	Previously, the user was unable to refresh the browser on a dashboard or report. Now, after the user clicks the Refresh button or presses F5, the dashboard is loaded without issues.
360748	Through an Exago update, fixed multiple issues in BI reporting where reports were not displaying correctly or had various formula or formatting errors.

360835	Users can now click "Apply" to place an Existing Report tile correctly on the BI Dashboard.
360836	Resolved issues that occurred when saving visualizations on a new BI Dashboard. After the Exago update, the Dashboard runs without error.

Documents

Case #	Resolution Notes
355903	Resolved an error when a Bluebeam session was finalized from inside Bluebeam vs inside e-Builder.
361731	Improved responsiveness of the Plan Room when multiple groupings are included.
362743	Document subscription notifications were sometimes not sent when the user had subscriptions to multiple folders that were updated. The consolidated notice now operates as expected.
363173	Users can now successfully export the Documents Log using the Chrome browser.
365679	When trying to load a folder with a great number of files, the browser was becoming unresponsive. Now, the files load in a timely manner.
366083	The Brava viewer was not loading and displaying some drawings correctly. This issue has been resolved.
366814	If a user checked out a file and attempted to check it back in by uploading the file, an error was generated if the user was not the original creator of the file. Now, the file can be checked back in by uploading it without errors.
368926	When stamping a document attached to a process, the Save as New Version option was not working correctly. This has been resolved.
369973	Resolved a permissions issue where document owners could not view documents that they had uploaded.

Forms

Case #	Resolution Notes

356540	When creating a form, CC users were not displayed on the Comments tab. This issue has been resolved.
363005	On Forms, users were sometimes unable to use the Download All Files button. This feature is now operating correctly.
364259	Clicking the Save button after entering external comments for a form generated an error even though the comment was added successfully. This issue has been resolved.
366236	The user can now edit and save the global custom field for projects without issues.
368280	An issue prevented users from saving the Form drop-down values as draft if the values were copied from certain software such as MS Word. Spaces between the drop-down values were being replaced with special characters. Updated the code to handle such formatting discrepancies.

Navigation

Case #	Resolution Notes
371696	The user was being switched from the Classic Style view to the Compass Style view when editing any field when the keyboard Enter key was selected. This issue has now been resolved.

Notification Engine

Case #	Resolution Notes
371360	The Daily Summary email from the Documents module was incorrectly generating multiple emails per folder. This issue has now been resolved and all the folder changes are now sent as a single email every day.

Processes/ Workflow

Case #	Resolution Notes
326382	Resolved an issue where the Requested Comment checkmark was not appearing on the ‘In My Court list’.
338455	Updated the code so that a user can see draft instances only if they are in at least one role that is selected for the "Who can view drafts of this processes" permissions.
344938	When editing the Description of a process data field, if >= or <= were included, those characters were being replaced with = after clicking Next to proceed to the next step. This has been resolved.
350289	When adding items to a grid via Excel import, the system was creating duplicate items instead of updating existing grid items. This behavior has been corrected so items that are already in the grid do not get duplicated and data is updated for those items.
350774	A field with 2 carriage returns was used to create a blank line to separate two rows of information in a process. Upon saving this process, the field was emptied. This issue has been resolved.
351360	A commitment invoice process was taking a long time to save. This has been significantly improved.
352918	The notification service was generating incorrect file names. This has been resolved. Files that are emailed from the notification service will have the same file name that is stored in the Documents module during mail merge.
354967	An error was displayed when trying to move past a mail merge step. This issue was resolved by upgrading versions of the Third-Party PDF tool
357219	When users were removed from a project, their names were replaced with a GUID in the Design Review Comments dynamic grid. Removed users will now appear as '<user name> (removed from project)'
358297	Resolved an issue where the system did not accept a re-entered password to approve an action if the user pressed the 'Enter' key instead of clicking the 'Approve' button.
359357	Resolved an issue where the incorrect time zone was displayed when using the "Today()" expression. When using the "Today()" function, the system will now use only the date component and not include time. Also, when saving a draft with the

"Now()" function, it will now convert the date & time according to the user's time-zone.

360301 Resolved an issue where a user received an error when opening a Commitment Change process with a very long Change Number string.

360302 An error appeared after importing a process file with Project Level Options and empty values in those option fields. This has been resolved by adding a null check.

360496 Added code to round the Amount for custom funding.

360909 Users could not execute an automated step during mail merge. This occurred because one of the attached files were password protected. Users will now see an error message asking them to remove the password requirements before executing the step.

362277 The Commitment Change Item amounts were not displayed correctly. This was due to a large total amount that did not fit in the fixed column width. The column width has been increased to accommodate up to 11 digits to the left of the decimal.

362637 A grid in a process uses decimals but some users would see the values rounded to whole numbers while others would see the decimals. This issue has been resolved.

364971 Added validation for funding source distribution for invoice items. When 100% of the funds are not distributed across invoice items, an error message will now be displayed requesting the user to check that all funds are accounted for correctly.

365524 When importing an invoice within a process, updates to line items where the This Period Amount is $0.00 were being ignored. This issue has now been resolved.

366005 The value in the controlling field will be automatically selected (for check boxes and radio buttons) if there is only one dependent value for that field.

366252 Resolved an issue to ensure that multiple selections in multi-select box remain selected as a workflow moves between steps.

368653 Resolved an issue where users were unable to see finished instances when they were step actors of a process. Optimized the query and resolved functional issues.

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369287	Sorting integers did not work correctly in the Dynamic Grid. Added code to handle sorting of integer and decimal datatypes.
370235	Updated the code to handle the case where no commitment invoice item exists for a commitment item (which would otherwise result in an error).

Reports

Case #	Resolution Notes
354473	Some standard process reports were not correctly resolving time zones and due dates were off by one day. The reports are now storing dates in the "datetime" format and are correctly converting from the UTC time zone.
356596	The Report Commitments Funding report was showing a Funding Source amount that was different from the Commitment column. The code has been updated to include 'closed' commitments in the grid to correct this mismatch.
356797	After the Exago upgrade, the BI Report runs without error.
358088	The Audit Log report filter for the Process View has been added.
360557	The resource rates were being calculated incorrectly. This issue has now been resolved and the auto-calculated rates are correctly displayed when loading the schedule.
362487	Resolved an issue with usage of the 'does not have a value' filter in reports.
364268	The reports were displaying schedule date field results in the default time zone. Now, the dates will be converted to the user's time zone when the report is run.
365845	Resolved data discrepancies and now the report data for "Schedule Manager" matches in both Standard and BI reports.
368199	Linked process reports with rich text fields were failing. Rich text fields can now be included without errors.
370490	Reports were showing outdated information due to a database problem. This issue has been resolved and the reports show accurate live data as expected.

Scheduled Task Engine

Case #	Resolution Notes
366175	Added a log to track scheduled tasks at each point and identify if they do not run as expected.

Schedules

Case #	Resolution Notes
362433	Previously, snapshots were being taken for each task in the schedule, causing duplicate entries. Now, the snapshot is taken just for the overall schedule entity.
364213	Notifications were not being sent or received with the Request Comment feature on the schedule. This issue has been resolved and the Request Comment on Task feature will send an email notification as expected.
365067	Resolved an issue that prevented users from making additional changes to the schedule after making a single initial change.
365716	Dependent tasks are now updating properly without issues.
367716	Previously, the system was not automatically taking a snapshot of the schedule after doing an import. Now, when tasks are imported, a snapshot is taken as expected.

Search

Case #	Resolution Notes
359602	Resolved an error that caused Search to intermittently not return results.

Submittals

Case #	Resolution Notes
359653	Added a validation step to prevent closed submittal items from accidentally being sent back into the review cycle.

User Setup

Case #	Resolution Notes
358021	Updated the query used to display users who are online.

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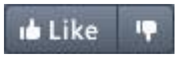
- **Like/Dislike** 

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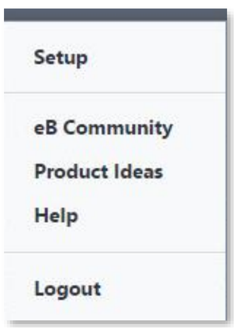

- **Support** – Our Support staff is always available to meet your needs. To speak to a live customer service representative, call us within the U.S. at 888-288-5717 and outside of the U.S. at 800-580-9322, or email us at support@e-builder.net.