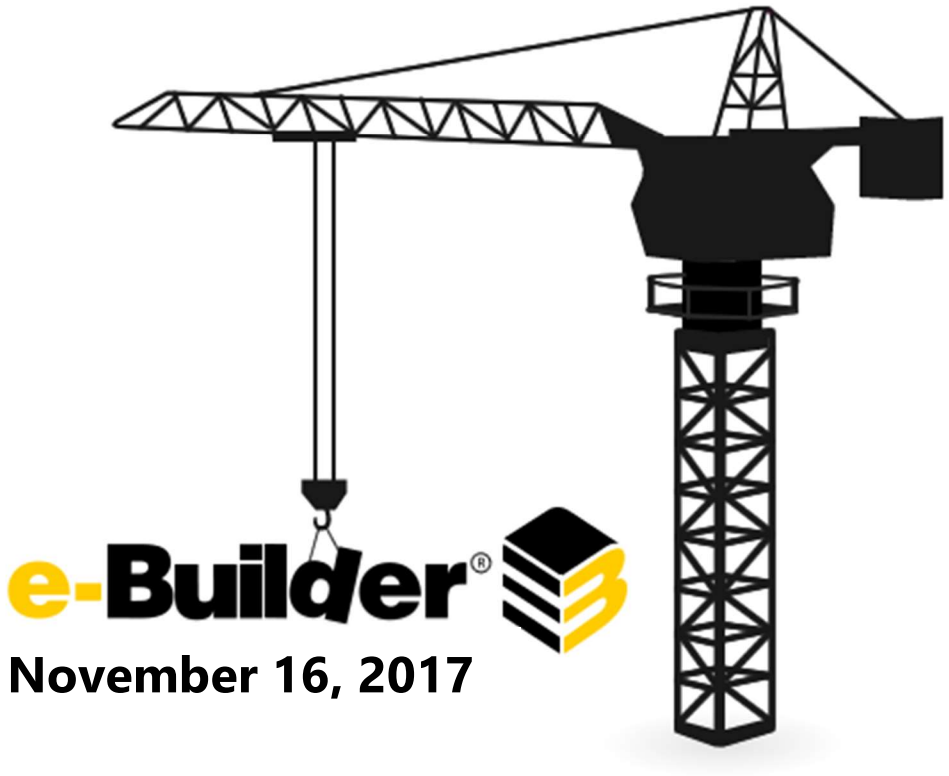
Maintenance
RELEASE NOTES



November 16, 2017

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 of the client organization without previous authorization from e-Builder.

©Copyright 2017, e-Builder, Inc

Table of Contents

About the November 2017 Maintenance Release 3
Your Opinion Matters 3
What's included in this Document 4
Release Note Change Log 4
Dynamic Grid Enhancements 4
Resolved Cases 5
Bidding 5
Contacts 6
Cost 6
Documents 7
Processes 7
Reports 11
Schedule 12
Setup Admin 13
Submittals 14
Time Tracking 14

About the November 2017 Maintenance Release

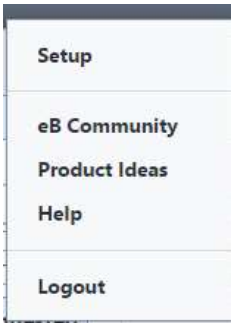
The e-Builder monthly maintenance releases contain a list of resolved cases for the month.

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 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.
- **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

- Dynamic Grid Enhancement (Q3 release) Update
- 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
November 16, 2017	1.0	Initial Release

Dynamic Grid Enhancements

Several enhancements have been added to dynamic grids in the latest enhancement release in Q3. 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.

New Dynamic Grid features:

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

There is set up required to access these enhancements. If you are interested, please contact account management

To review the Q3 release notes and find out more about the Dynamic Grid Enhancements copy and paste the link below into your browser.

https://info.e-builder.net/rs/859-SBQ-780/images/Q3 2017 Release Notes.pdf

Resolved Cases

The following is a list of resolved cases for the month of November. 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.

Module	Number of Resolved Cases
Bidding	9
Contacts	1
Cost	7
Documents	5
Processes	32
Reports	10
Schedule	3
Setup Admin	5
Submittals	2
Time Tracking	1

Bidding

Case Number: 00240803

BIDDER PORTAL UNABLE TO SAVE BID SCOPE TEMPLATE ABOVE A CERTAIN CHARACTER LIMIT

Previously the system would allow the user to enter a description of more than 100 characters, which are the max-length that field can have in the database. Limited the user to enter only up to 100 characters to prevent this error.

Case Number: 00208876

Additional Cases Resolved: 00234582, 00209189

BID DAY ISSUES

Users may have experienced mismatching columns on the Bid Tabulation screen. Cells with no bid details were not being drawn, shifting other cells. We now show a value of 0 for bids without details, so cells are drawn the correct way, and values match.

Case Number: 00231221

Additional Cases Resolved: 00231534, 00234141, 00235245, 00236123

E-BUILDER ERROR WHEN CLICKING ON BID TABULATION TAB

Previously, the Bid Tabulation page gave an error. This was caused when in the Bid Tabulation report the Option "Display cost per square foot" are selected and "Display unit cost" is not. Now the page is correctly shown.

Contacts

Case Number: 00238786

IMPORT USERS

Previously the system was throwing an exception when trying to map the License Type of the user in the import file due to that the values in the excel has an ending space, that was preventing to match the license type of the system. Trimmed the values to remove any leading and trailing space when comparing to no longer throw that exception.

Cost

Case Number: 00229066

Additional Cases Resolved: 00229212, 00229474

UNABLE TO ENTER COST DATA

Previously, some projects were not showing in the project drop down when creating Cost entities from the Data Entry link. 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: 00229428

BUDGET CONTROL VIOLATION WITH A COMMITMENT CHANGE THAT IS ALREADY APPROVED

Users trying to move a cost integrated commitment change process from a step with "Causes Cost Control Validation?" flag set on an action, and having previously approved the commitment change may not be able to continue the flow. We discovered that validation controls were making calculations based on current commitments, plus the sum of commitment change items in the cost integrated commitment change process, even when the commitment change was approved (meaning it was already part of the current commitment amount). We changed this to calculate cost control validations correctly.

Case Number: 00231436

ADD SCOPE COMMITMENT CHANGE, DOESN'T RESPECT UNIT COST

When creating a master commitment change from an existing master commitment the system was not loading the Unit Cost settings from the master commitment. Now we check if the master commitment is set to use Unit Cost and then we show those fields when adding an additional scope item.

Case Number: 00232261

TOTAL RETAINED THIS INVOICE = $0.00

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: 00233882

CASH FLOW

Previously, in Setup Cash Flow page after selecting a template, changing Schedule Link Type list is not working. The issue is after selecting a template when the Schedule Link Type dropdown list is not maintaining the selected option. Now, the system works properly and allow the user to change the Schedule Link Type dropdown list.

Documents

Case Number: 00231683

Additional Cases Resolved: 00232052, 00239482, 00240011

ALL FOLDERS COLLAPSE WHEN A DOCUMENT IS UPLOADED

Previously the system was collapsing all the folders when a document is uploaded due to a previous code change. Now the system works properly.

Case Number: 00237147

MESSAGES ARE NOT SENDING SUCCESSFULLY

Previously, messages from Project Participants Menu are not being sent. Now, the messages will be sent, and Status column will be updated.

Processes

Case Number: 00210617

PROCESS STEP PAGE

Previously when hovering over steps in the Workflow Designer of a process, the Name and Description tooltip for the step you're hovering over were not showing. We've corrected the error and they should now show as expected.

Case Number: 00211156

DYNAMIC GRID "GROUP BY" FEATURE DOES NOT WORK PROPERLY

Previously there were incorrect ordering in 'dataview' by default. Now the 'slick.dropdowngrouper' plugin and set up ordering is by ascending for grouping in dynamic grid.

Case Number: 00217163

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

Negative budget changes were able to violate cost control. The system was 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: 00226991

INABILITY TO EDIT LAYOUT FOR DYNAMIC GRID

Some users were unable to horizontally scroll their dynamic grid window. This was due to the scroll bar being between the header rows, and some empty rows, if the header rows had much text on them. We removed the rows, and fixed the scroll bar to appear regardless of the row height size.

Case Number: 00228647

GROUPING OF CSI DIVISIONS ON PAY APP NOT SORTING CORRECTLY

Previously, incorrect work ordering in 'dataview' by default in dynamic grids. Now the set up is ordering by ascending for grouping in dynamic grid.

Case Number: 00230477

ERROR OCCURRING WITH PROCESS INSTANCE WHEN IT IS UPDATED

Saving process produced a page error when updating 'Commitment Change Items'. Now, the process will save successfully.

Case Number: 00230829

MAIL MERGE DOES NOT INCLUDE ATTACHMENTS

Users using the mail merge functionality of a process will sometimes find out some of their merge results to be missing selected attachments. There used to be a control of the system to do not allow Mail merges to be merged with themselves. This however, also caused mail merges to be unable to be merged with other mail merge templates. We decided to allow users to merge mail merges with the same name (even themselves), if the user so wishes..

Case Number: 00232801

Additional Cases Resolved: 00232923, 00233030

DOCUSIGN ISSUE - "REVIEW AND SIGN" IN PROCESS CA FAILING

This is Docusign process where a list of signers would sign the document, so one of the signer id was been sent as zero because of which the api call failed. But now implemented code to surpass the invalid signers, so that others can sign and Added logging to investigate the issue in future.

Case Number: 00233473

ERROR WHEN OPENING AN INSTANCE OF A MASTER COMMITMENT CHANGE

Previously the system was throwing an error when trying of open an instance of a master commitment change if it has more than one change item referencing to the same existing master commitment item. Now the system work properly.

Case Number: 00233577

POPUP FOR BROWSER COMPUTER ON PUBLIC PAGE FOR START PROCESS IS MISSING SECTION FOR SELECTING A FILE

The file upload fields were not shown when starting a process from the public process page. The page was fixed and now the upload component is visible.

Case Number: 00234452

PROCESS INSTANCES ARE DUPLICATED

Previously, the system is showing two duplicated instances. This issue happens when the system duplicates an instance step and the root cause is unknown. Now, the user will see one instance and the other will be marked as deleted.

Case Number: 00234695

ATTACHING DOCUMENT TO PROCESS GIVING A VAGUE ERROR MESSAGE

Attaching the document to a process instance generates a vague error message, if "No Access" permission is set at the same moment the user is uploading the file. This is because the system does not handle this exception. Now the system will catch this exception and send a nice message.

Case Number: 00235010

Additional Cases Resolved: 00230700

ERROR WHEN OPENING MASTER COMMITMENT CHANGE PROCESS

Previously the system was throwing an error when trying to open an instance of a master commitment change process due to it has one change item that is not present in the master commitment items. This happens because was allowed to add in a master commitment change a change item with reference to an existing item that was added as new scope in another master commitment change and is not approved yet, and if this second master commitment change is deleted the first master commitment will have the null reference of the change item.

A code fix made to not allow the selection of master commitment items that has not been approved yet and data fix to delete the master commitment change item that has no reference with any master commitment item.

Case Number: 00235695

NO COMPANY ON COMMITMENT CHANGE IMPORT ERROR

The system was showing a generic error when trying to import the commitment change and there was no company found using the specified value in the company column. Now the system checks if there is a company with the specified name before trying to retrieve the company information from the database.

Case Number: 00236729

Additional Cases Resolved: 00236683, 00236715, 00236924, 00237063, 00237163, 00237863, 00230555, 00237621

MAKING COMMENTS PRIVATE IN THE COMMENTS TAB UNDER THE PROCESS STUCK UPDATING

Previously the system was not making a comment private due to a conflict with a library after the dynamic grid enhancement was released. Now, the system works properly.

Case Number: 00236880

Additional Cases Resolved: 00236727, 00237157, 00237318

DRAG AND DROP DOCUMENT ATTACHMENT NOT WORKING IN PROCESS

Inability to use drag and drop of files while in processes is now resolved.

Case Number: 00237502

PROCESS COST VIOLATION DEFECT

previously, when adding a project commitment change for a master commitment via process and adding those commitment change items via the 'add new scope panel' and instead of 'add all existing items' the master cost control violation aren’t checked. now with the fix master cost violations are checked during a project commitment change.

Case Number: 00238299

RETENTION HELD NOT CREATING A LINE TO RELEASE THE RETENTION

The problem is that custom field values are not saved when the cost integration of the process is a Retainage Release invoice for a standard commitment. The System does not validate when an invoice is a Retainage Release, in this case. Now there is validation of whether the invoice is a Retainage Release. If the line item has a value, the system must save its custom fields.

Reports

Case Number: 00228863

BI Report Disappear after Modifying Existing Report and Saving

Previously, when you saved a report using the "Only me" option and you were not the owner, you stopped visualizing it and only the creator could visualize it. We've changed the behavior, now we show a warning so that the one who keeps the report can expropriate it, as long as user agrees.

Case Number: 00229280

Report miscalculating average

Previously the system was calculating the average incorrectly for formula columns due to an issue rounding the value to the quantity of decimal places the formula column had defined. Now the system works properly.

Case Number: 00231732

HTML Codes appearing in Report data Exported to Excel

Previously the system was displaying the code for special characters like '&' when a report is exported to excel and the column type is a Rich Text Editor due to that wasn't decoding the value of those fields. Now the system works properly.

Case Number: 00232176

Additional Cases Resolved: 00234065

Report Export Error

This issue report unable to export or view was because of report formula attributes (formula datatype) where not been set appropriately while deleting the report formula from the report formula grid in the code , but now it should work as all the attributes of the report formula are set accordingly.

Case Number: 00232625

Account Code not displayed when report is run

Previously, the column "Account Code" was not displaying any values for a Process Line Items Report. This was happening for any type of report: Tabular, Summary, and Matrix when the Account Code is a column and the report sub type is a Process Line Items. Now, the column will display the values and the link to the page.

Case Number: 00232667

Exported report is reading date information as a day prior to the original date.

Previously, exporting a report to excel or another format is showing a â€˜12:00AMâ€™ timestamp next to the date. This was caused by an incorrect conversion of dates. Now, the date will show in the exported excel the same as the report.

Case Number: 00232948

NO RESPONSIBLE ACTOR LISTED WHEN THERE ARE ACTORS ON THE PROCESS

Previously, both in processes and Reports, the Responsible Actors columns wasn't pulling data from the correct table. Now the process screen and Reports, the Column, Responsible Actors are now being populated from the swInstanceStepActors table.

Case Number: 00233615

SUBSCRIPTION REPORT NOT BEING SENT TO EXTERNAL USER

Sending scheduled reports in pdf format to more than one email recipient was failing because the pdf file was being deleted after sending the first email, causing the system to fail when trying to attach the pdf file to the remaining recipients, generating an error. Now the issue is fixed in the notification service and the file is sent to all the listed email recipients..

Case Number: 00237282

GETTING A PINK SCREEN ERROR WHEN ADDING A FORMULA COLUMN IN REPORTS

Previously there was an error when trying to add a formula column due to 2 custom fields with the same name (Project Type) and the same object type (Projects). Data fix made to correct one of the name to 'Project Type1'. This scenario could not be reproduced.

Schedule

Case Number: 00224225

INVOICE UPLOAD FOR AP DATE UPLOADED INVOICE CUSTOM FIELDS ARE BEING POPULATED WITH THE INCORRECT DATES

The problem is that the "AP Export Date" data field (date type) associated with an invoice is filled with the wrong date because of who assigns the value is the Scheduled Report when the execution is successful. The system assigns the date of the server, which has a different time zone than the execution of the scheduled report. The solution is to save to the database, the date on which the task is executed.

Case Number: 00230257

SCHEDULE ACTIVITIES NOT SORTED CORRECTLY AFTER SCHEDULE UPLOAD

The problem was that the original sequence number wasn't used for tasks ordering.
We Implemented logic for task ordering by original sequence number.

Case Number: 00230760

CANNOT IMPORT MPP FILE TO CREATE SCHEDULE TEMPLATE

Importing schedule templates produced a page error when moving to the review step in the wizard. Now, the review step will display the items that will be imported or the exceptions.

Setup Admin

Case Number: 00209768

FILTERING "WHERE USED" RETURNS ERROR

Users trying to filter workflows using the "Where used" functionality could have received timeout errors. The sql query used for this propose took 14 minutes to run. Our performance team fixed the query to run under 3 seconds. Now users should be getting workflows when filtering

Case Number: 00230143

AUTOMATED SCHEDULED TASKS ARE FAILING, MISSING OR INVALID PROPERTY

This scheduled task was failing because it is of type "Save Schedule Snapshot" and they are asking to save a schedule snapshot to every project in the account and there are some project schedules containing tasks without start or finish date, the system was throwing an exception when creating a snapshot task without start or finish date, confirmed with product team and that restriction was removed, now the snapshots are created.

Case Number: 00237793

CUSTOM FIELD ERROR ON MULTI-PICK

Previously the system was throwing an error when trying to update a custom field of type multi-pick list due to a incorrect handling of the existing custom field values when one of them has no value. Now the system works properly

Case Number: 00238955

ERROR WHEN CREATING BID SCOPE TEMPLATES, "YOU MUST ENTER TEXT WITH 5 OR FEWER CHARACTERS"

Previously IE was preventing the user to submit the page due to a new auto-validation feature that IE has. Now, the user can submit the page using IE.

Case Number: 00239168

TYPO ON DELETE FORM CONFIRMATION SCREEN

Previously the system was displaying the word comment with 3 m's. Now, the system display the word comment with 2 m's.

Submittals

Case Number: 00229971

PROCESS INSTANCE WON'T LET ADMIN VOID, DELETE OR APPROVE

Cost control validation shouldn't happen when moving a draft or pending commitment to Void status through process. Now the system was adjusted for these scenarios.

Case Number: 00241029

CREATING SUBMITTAL PACKAGE (TRADE) DATA FIELD

Previously, the system was changing the value of the field Trade for the description of the code if the user enters some value when adding a new Submittal Package. Now, the system works properly and doesn't change that value if the user enter a new value.

Time Tracking

Case Number: 00227455

TIME SHEETS ARE STUCK IN START STEP

Users using the Time Tracking module, that created a workflow with a conditional that used a project custom field could use it as a single field, instead of a project list. This caused time tracking instances to fail processing when getting to the conditional portion of the workflow. We added a validation on the conditional editor, preventing users from creating conditions based on project list custom fields without using one of the list functions (Exists, None, All). Users with instances stuck in the conditional step can correct and re-publish their workflows in order to move the time tracking instance forwards.