



# Q1 2019 Release Notes

**APRIL 19, 2019**

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## Q1 2019 Enhancement Release

e-Builder quarterly 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. This release also includes a list of resolved cases for the past month.

### What's New

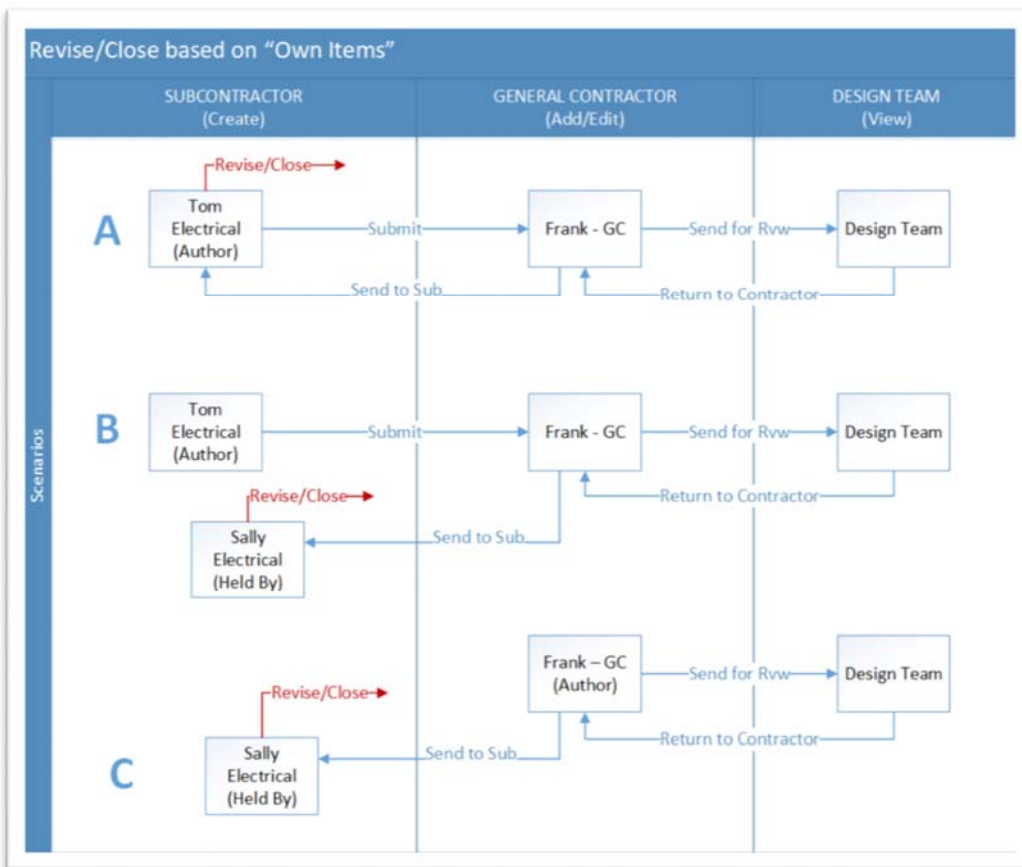
The following is a list of enhancements included in the release. If you have any questions regarding this release, please contact e-Builder [Technical Support](#).

## Submittals

### Create Permissions – Revise and Close

A new submittal permission “Create” was added in the Q4 2018 release. Team members (typically trade contractors) with Create permissions can create submittal items and packages and submit the materials to the Add/Edit team member (typically, the Construction Manager).

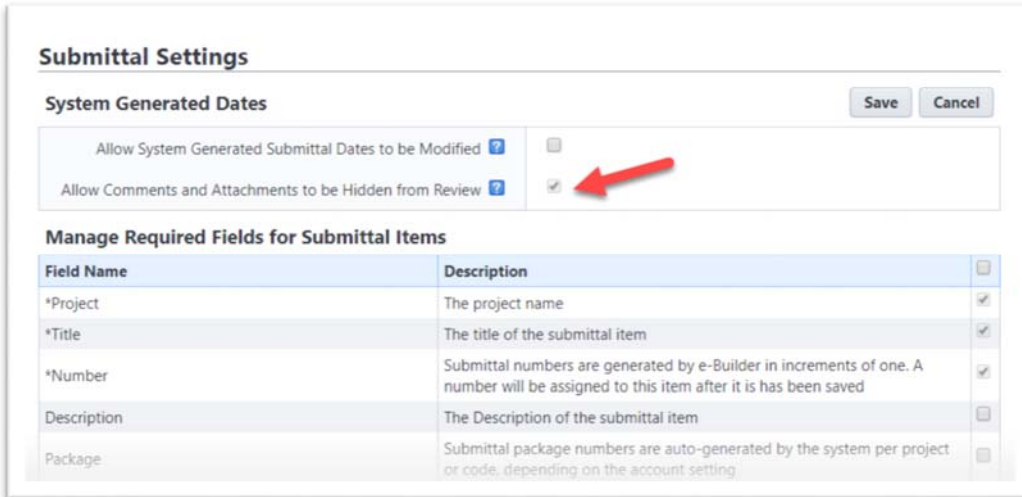
This release expands the Create permission to allow team members to create revisions and close their own submittal items. “Own items” are defined as submittal items where the team member was the original author or is the current Held By person.



Revise/ Close Own Items Scenarios

## Submittal Account-level Setting – Hidden from Review

The account-level submittal setting, “Allow Comments and Attachments to be Hidden from Review”, was set to be removed from the setup page once it was activated for the account. As of January 2019, e-Builder displays this setting regardless of whether it is activated or not. However, the submittals for certain accounts did not follow the setting correctly. With this release, this setting and the behavior of the submittals in the account now match.



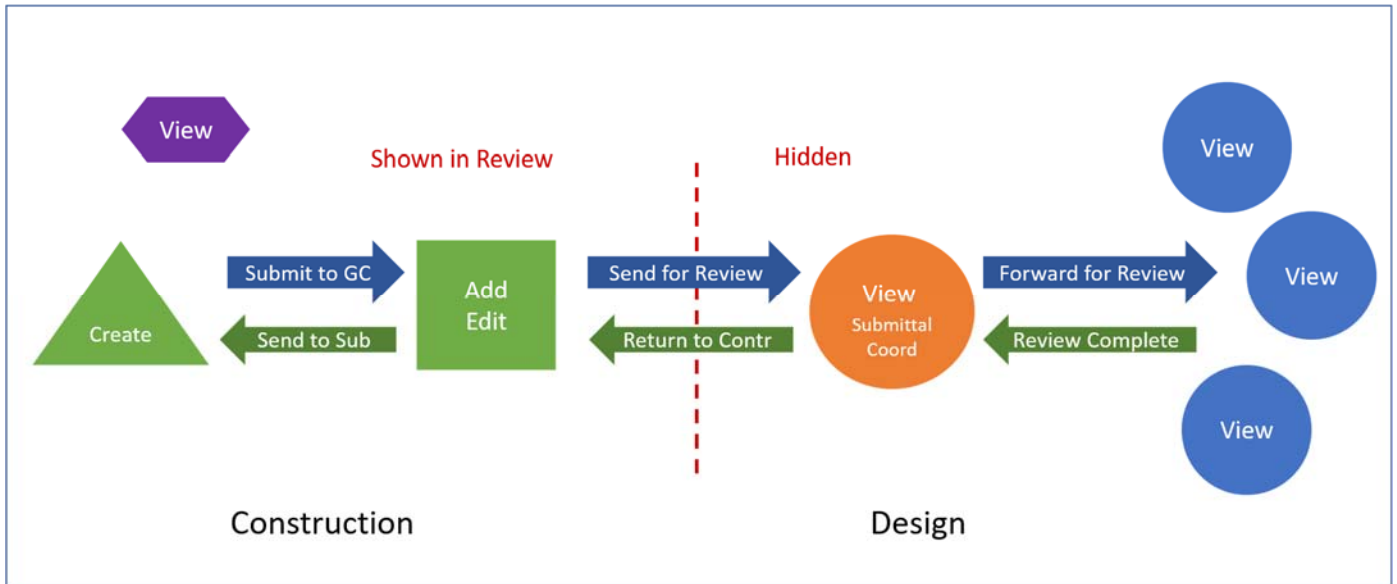
| Field Name  | Description  |                                     |
|-------------|--|-------------------------------------|
| *Project    | The project name   | <input checked="" type="checkbox"/> |
| *Title      | The title of the submittal item  | <input checked="" type="checkbox"/> |
| *Number     | Submittal numbers are generated by e-Builder in increments of one. A number will be assigned to this item after it is has been saved | <input checked="" type="checkbox"/> |
| Description | The Description of the submittal item  | <input type="checkbox"/>            |
| Package     | Submittal package numbers are auto-generated by the system per project or code, depending on the account setting                     | <input type="checkbox"/>            |

*Allow Comments and Attachments to be Hidden from Review field in Submittal Settings*

**SETTING OFF:** When this setting is OFF (unchecked), all Public submittal attachments and comments are visible at all times to any team member with View permissions to the Submittal module. Construction team members can see and possibly take premature action on incomplete submittal packages reviews.

**SETTING ON:** The implication of turning the “hidden from review” setting ON is that all attachments and comments added by the Design team are hidden from the Construction team during the review process. When the Submittal Coordinator returns the submittal to the contractor, the Coordinator determines which attachments and comments are “shown” with the final response.

**Note:** Currently, the “Allow Comments and Attachments to be Hidden from Review” setting cannot be turned off by the customer once it is activated. If your organization needs to discontinue this feature, contact e-Builder Technical Support to request that our engineering team turns it off on your behalf. Be aware that every project in your account will be affected, including previously reviewed submittal packages.



*Comments and Attachments Shown or Hidden from Review*

## Bid Portal

### ***Ability to Multi-Select Invitation Documents for Download***

Bidders can select entire folders from the Bid Portal for faster downloads of invitation documents.

#### **To download a folder with subfolders and files**

- On the Bid Portal, click on the download icon next to any folder on the Invitation Documents tab.

A progress bar will indicate a successful download of the documents. A confirmation message will be displayed if the download is successful. The downloaded documents are stored locally for the bidder in a ZIP file.

The screenshot displays the 'Invitation Documents (10)' tab in the Bid Portal. At the top, there are tabs for 'Bid Info', 'Invitation Documents (10)', and 'Addenda (1)'. Below the tabs, there are 'Hide All' and 'Show All' buttons. A green notification bar at the top states 'Download was successful.' with a 'Close' button. Below this, a progress bar for '21 Solicitation' is shown, indicating a 'Complete' status with a green checkmark and '1.19 MB' size. A red circle with the number '2' is placed over the progress bar. Below the progress bar is a table with columns for 'File / Folder Name', 'Date Time', and 'File Size'. A red circle with the number '1' is placed over the first row, which is '21 Solicitation (4)'. A red box highlights the download icon for this row. The table lists several items: '21 Solicitation (4)', 'Specifications (1)', 'Submittal Register Example.xls', 'Drawings (5)', 'tree house.jpg', and 'hoot owl.jpg'. A red circle with the number '3' is placed over the bottom of the table. At the bottom of the table, there is a yellow box containing 'e-Builder Downloa...zip' and a 'Show all' button.

| File / Folder Name             | Date Time          | File Size |
|--------------------------------|--------------------|-----------|
| 21 Solicitation (4)            | 11.05.2018 5:27 PM |           |
| Specifications (1)             | 11.26.2018 8:30 AM |           |
| Submittal Register Example.xls | 11.26.2018 9:42 AM | 159.74 KB |
| Drawings (5)                   | 11.26.2018 8:30 AM |           |
| tree house.jpg                 | 11.26.2018 9:42 AM | 285.54 KB |
| hoot owl.jpg                   | 11.26.2018 8:48 AM | 14.22 KB  |

## Forms and Processes

### ***File Transfer Technology Update***

In the Q2 2018 Enhancement Release, e-Builder introduced the first release of a new file transfer technology update to improve performance and stability for file transfer operations. The initial release updated the underlying technology that is used for both upload and download operations in the Documents Module. As part of the Q3 2018 Release, e-Builder implemented the new file transfer technology update to additional areas of the product where documents can be attached, uploaded and downloaded.

In the Q1 2019 Release, the new File Transfer technology will now also be used when attaching or transferring documents in the Forms and Processes modules, in addition to the other modules that were updated earlier.

#### ***Downloads***

The process for downloading files remains the same in this release. The technology changes that occurred are all behind the scenes and you will continue to be able to use the Download link to download a file or multi-select to download a group of files.

#### ***Uploads***

In the past, there have been several different interfaces for uploading documents, each with slightly different capabilities. We looked at the varying uses of the multi-file, single-file, and drag & drop upload tools to come up with a standard interface with the best combination of functionality. The new interfaces can still be accessed by clicking the Upload link or by dragging and dropping onto the documents pane. The new interface supports drag & drop for both files and now also folders. Adding files descriptions as a group or to individual files has been standardized as well. This new upload tool supports all modern browsers such as Chrome, Firefox, Edge, and Safari. All users accessing e-Builder from these browser platforms will see the new upload tool.

Users of Internet Explorer 11 (and earlier) will continue to use the existing single file, multi-file, and drag and drop upload tools.

The File Transfer technology is already available in the modules listed below:

- Documents
- Submittals
- Commitments
- Invoices
- Project Details
- Planning



- Bidding
- Companies/Contacts
- Cash Flow
- Funding
- Equipment

## Processes

### ***Support for Microsoft Word (.docx) Files in External Workflow Processes***

Once a workflow process has been configured with the ability to start the workflow offline, it is saved as a Microsoft Word® document. An internal e-Builder user can then download and send it to an external user who can fill out and email back to a generic e-Builder email account, which will start the workflow process.

e-Builder users as well as the external participants now have the ability to save the workflow process file either as a Microsoft Word 2003 to 2007 version file (.doc) or a Microsoft 2007 and above version file (.docx).

### ***Workflow Settings to Restrict Document Removal After the Finish Step***

To provide flexibility and control in scenarios where document removal must be restricted, a new option has been added to the workflow settings to disable the "Remove attachment" link after the finishing step. When this option has been enabled, the original user who uploaded a document will not be able to remove the attachments from the process.

|                   |   |
|-------------------|---|
| After Finish Step | <input checked="" type="checkbox"/> Allow Comments and Attachment to be added<br><input type="checkbox"/> Disable the ability to remove attachments |
|-------------------|---|

In the **After Finish Step** field on the Workflow Properties page, select the **Disable the ability to remove attachments** check box to prevent removal of the attachment(s) from the process after the finish step. If this check box is selected, the remove link will be disabled for the attachment(s).

#### **Note:**

- The **Allow Comments/Attachments After Finish Step** field has now been renamed to **After Finish Step**. However, there is no change to the functionality of this field.
- In the **After Finish Step** field, the **Allow Comments and Attachments to be added** check box must be selected first to enable the **Disable the ability to remove attachments** check box.

## 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   |
|--------|--|
| 301224 | The “actuals” custom fields for commitment invoices are now included when using the API. |
| 304575 | The “actuals” custom fields for general invoices are now included when using the API.    |

### AppXchange

| Case # | Resolution Notes   |
|--------|--|
| 306646 | The documents are now displayed correctly when the View hyperlink is selected. |

### Bidders Portal

| Case # | Resolution Notes   |
|--------|--|
| 314324 | Resolved an issue where bidders were temporarily unable to use Upload Bid Cost feature to import from Excel to the Bid Form. |

### Calendar

| Case # | Resolution Notes  |
|--------|---|
| 309151 | Users were previously receiving multiple calendar notifications in Outlook for the same event. To avoid duplicate notifications being sent to Outlook, e-Builder now performs checks in our notification queue. |

## Cost

| Case # | Resolution Notes   |
|--------|--|
| 294623 | Concurrent processing of commitment invoice processes could result in the Cost Summary not updating to include all received/approved/paid invoices. Now, each Commitment Invoice Process is accounted for at any level of concurrent processing.   |
| 297958 | Previously, after updating the cashflow, very small amounts related to rounding off from a linear selection were being added in the month with the highest amount for the other curves (Bell, S, Inverse S, etc.). Now, those rounding distributions have been allocated correctly.  |
| 301289 | Fixed an issue where the actual costs amount was not displaying correctly in the Cost Summary tab. The cost summary is now updated as part of the same transaction as the invoice creation.  |
| 303295 | Optimized the query to avoid timeouts while updating commitment invoices.  |
| 303295 | Optimized the query to use separate queries for general invoices and commitment invoices.  |
| 305967 | When updating a cashflow, a performance issue was identified with updating the current cashflow. This operation has been optimized.  |
| 310015 | <p>Previously, when using "Data Entry - Import Master Invoices" to import a Master Invoice, the "Invoice Item Amount" for a Commitment Item was incorrectly adding the Item "Amount Retained", which is calculated from the Commitment Item's Retainage % x Master Invoice's "Invoice Item Amount". Also, when importing a Master Invoice with the "Is Retainage Release" setting enabled, the Step 3 of 3 summary for the first row was showing "Master Invoice Item Retainage Release Amount" of "0.00".</p> <p>Now, the "Invoice Item Amount" calculation has been corrected and the correct "Master Invoice Item Retainage Release Amount" appears on the Step 3 of 3 summary.</p> |
| 310388 | An error occurred when changing the status of a general invoice on accounts. This occurred when the "Project Contact Setting" was set to automatically add the company and contact used by a general invoice to the Project Contacts.  |

Now, the company and contact are added to the project and the general invoice is updated correctly. Also, using the data entry import for Update Invoice Status to mark a general invoice with the "Paid" status adds the association between the company and the project if it was missing.

## Custom Development

| Case # | Resolution Notes   |
|--------|--|
| 300596 | Resolved an issue to ensure that the baseline and Gantt chart are displayed.<br>When storing photographs, ensure that they are stored in the proper path using the parameter: PHOTOGRAPH_PATH in the Form Types for the Project Status Report. |
| 313112 | Resolved a customer-specific issue where the custom fields of Scheduled Tasks were preventing it from running properly.  |
| 312319 | Resolved an error that occurred when applying a CO number to a workflow process. This error was caused by an empty value.  |

## Documents

| Case # | Resolution Notes   |
|--------|--|
| 310011 | Resolved an issue where descriptions entered during file upload were not accurately displayed in the change history of a file. |

## Forms

| Case # | Resolution Notes  |
|--------|---|
| 313135 | Fixed a timeout error occurring for selected Forms views. |

## OData

| Case # | Resolution Notes  |
|--------|---|
| 304764 | The SQL TOP limit has been updated to 100K to ensure that all records are visible when pulling oData information. |

## Processes/ Workflow

| Case # | Resolution Notes  |
|--------|---|
| 303292 | Resolved the issue where deleting a source data field was not deleting the eSignature mapping.  |
| 306180 | Fixed an issue where the process configuration was being ignored when files were being added via drag and drop, and comments were being added as 'private'. |
| 306221 | Fixed an issue where custom fields added to a dynamic grid in use could not be found.   |
| 306268 | Fixed an error that appeared when files were being added via drag and drop to the default upload folder.  |
| 306641 | Both the role and enabled configuration will now determine if a comment is added as private by default.   |
| 309316 | A user-friendly error message is now displayed when a deleted instance is opened.   |
| 310062 | Resolved an issue where special characters were causing corruption when adding/editing an action.   |
| 310593 | Resolved incorrect formula calculations in a process when some arguments were empty/null.   |
| 311351 | Resolved an error with a customer-specific process that was caused by an empty value.   |
| 312513 | Resolved a time out error that appeared when accessing a list of dependent processes.   |

## Projects

| Case # | Resolution Notes   |
|--------|--|
| 308528 | When using the Chrome browser, some project's custom fields were being auto-filled with username information. That autofill behavior has now been disabled and Chrome should no longer autofill those custom fields. |

## Reports

| Case #             | Resolution Notes   |
|--------------------|--|
| 304402             | An issue occurred when reporting on date/ time custom fields as e-Builder would apply a time zone conversion for display. E-Builder now ignores any time zone conversion for custom fields.          |
| 306753             | An issue occurred when certain large reports were being exported as the result of a timeout setting being too short. The setting has been adjusted and the issue has been resolved.                  |
| 309018             | An issue occurred when running a cost report and selecting the "Submitted for Approval Date" column. This issue has now been resolved.   |
| 309337             | An exception error occurred when running a report in cases where a particular column did not exist. The application now checks for the existence of the column before trying to generate the report. |
| 312846             | Resolved an issue where the application was not handling the Finish Variance correctly. When the project is not baselined, the Finish Variance will not be populated in reports.                     |
| 313018 /<br>313063 | Resolved an issue where reports displaying the documents for users were not showing results, unless the user was an Administrator.   |
| 314523             | The error "There are no results for this report." appeared for certain reports. The error forced the selection of a specific project. This issue has been resolved.                                  |

## Scheduled Task Engine

| Case # | Resolution Notes  |
|--------|---|
| 308837 | Resolved an issue with scheduled tasks failing to complete due to an empty value.                           |
| 310418 | The date format was incorrect for the time zone. Now, the formatting is used based on the user's time zone. |

## Schedules

| Case # | Resolution Notes  |
|--------|---|
| 303863 | In the Gantt Chart, the green bar representing for the project's entire time line, was not aligning with schedule tasks that start before the schedule start date. Now, the green bar aligns with the start date of the schedule's earliest task. |
| 304406 | Resolved an issue where schedule custom fields were not automatically populated with the default values after applying a template.  |
| 308889 | Certain schedules were not loaded for accounts with Resource Management enabled. This was due to the schedule being created using a schedule template without any calendar. Now, a default calendar is automatically created for schedules.       |
| 312136 | The work values for a task with Fixed Duration and Resource Work scheduling mode were not saved correctly. This issue has now been resolved.  |


## Setup Admin

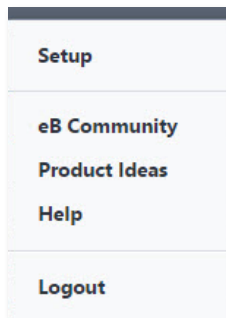
| Case # | Resolution Notes  |
|--------|---|
| 302538 | The User Adoption report now accurately reflects the number of times a user logged in to e-Builder.   |
| 306096 | The Result Details section now displays the correct number of process instances that were processed.  |
| 310618 | Resolved an issue where special characters in the Name or Description field prevented the 'Design Workflow' with Manage Processes from loading. |



## 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).