

# Q2 2019 Release Notes

**JULY 19, 2019** 

# **Table of Contents**

Q	2 2019 Enhancement Release	3
V	/hat's New	3
	Bid Portal	4
	Redesigned Bid Package Listing	4
	Submittals	6
	New Modify Project Settings Permission	6
	Resolved Conflict Between "Shown in Review" and "Private" Comments	7
	Cost	8
	Ability to Hide Zero Value Lines on Project Cash Flow and Forecast Pages	8
	Show Remaining Balance for each Commitment on the Project Commitment Summary Page	10
	Resource Management with Cost	11
	Schedule Template UI Enhancements	11
	Mobile App	13
	Release 1.3.5	13
R	esolved Cases	14
	API	14
	Bidders Portal	14
	Bidding	14
	Cost	15
	Custom Development	15
	Documents	15
	e-Signature	16
	Forms	
	Internal Admin Tools	
	Login Issues	
	Planning	
	· ·	
	Processes/ Workflow	
	Projects	
	Reports	18

	Scheduled Task Engine	18
	Schedules	19
	Submittals	19
Υ	our Opinion Matters	20

## **Q2 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 <u>Technical Support</u>.

#### **Bid Portal**

#### Redesigned Bid Package Listing

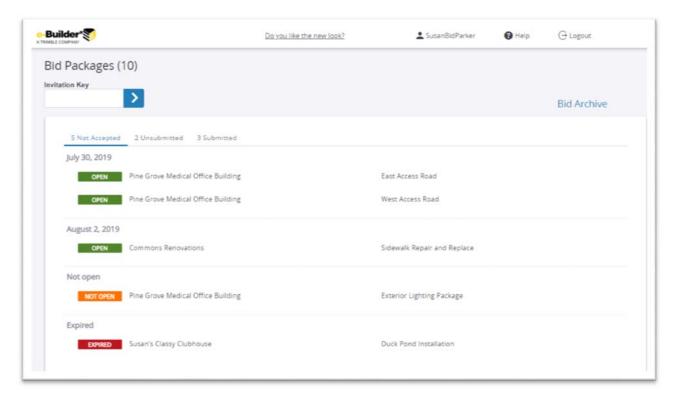
A redesigned interface for bidders on the Bid Portal was released in January 2019.

Based on feedback and usability interviews with 50+ bidders, we have updated the main Bid Package page and the Bid Archive page.

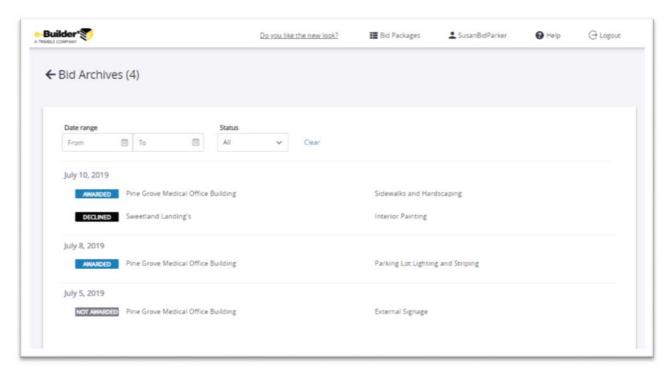
The primary changes are:

- Inclusion of the Project Name
- Grouping of bid packages by Bid Due Date
- Sub- tabs for bid statuses (Not Accepted, Unsubmitted and Submitted)
- A more prominent location of the Bid Archive link.

Redesigned Bid Packages Page



#### Redesigned Bid Archives Page

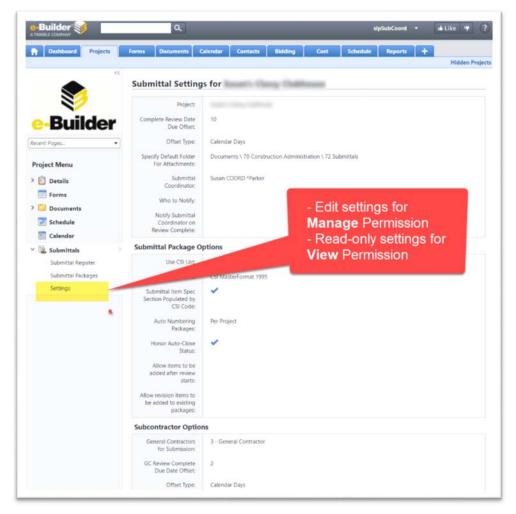


#### **Submittals**

#### **New Modify Project Settings Permission**

A new submittal permission "Manage Project Settings" has been added. Previously, all team members with Add/Edit permission (typically general contractors) could edit the project level settings, such as default timeframes and the assignment of submittal coordinators. On many projects, this was too broad of a group to manage sensitive settings. Now, edit access to the Project Submittal Settings has been separated and can be assigned to any role with View permission as needed by the project team.

**Project Submittal Settings** 



On initial rollout of the new permission, every team member with the Add/Edit permission will default to also having the Manage permission so that no functionality is lost in the upgrade. Administrators can subsequently change the Manage permissions to restrict or expand the edit capability as needed.

Additionally, all team members with View Submittals permissions will also be able to view the project-level submittal settings. This should reduce questions from team members by clarifying the settings used on each project.

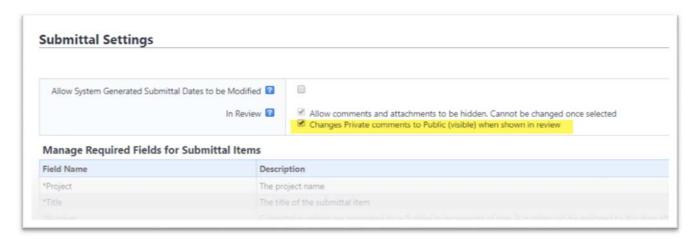
## Resolved Conflict Between "Shown in Review" and "Private" Comments

Previously when a design reviewer added a comment that was marked "Private" (by default or by the reviewer), the submittal coordinator could select that comment to be "Shown in Review" as part of the final package returned to the construction team. However, the Private status would override the Shown in Review status, and the construction team would be unable to view the comment. Any attachment to a Private comment would have a similar visibility problem. Furthermore, if the submittal coordinator realized there was a problem, they were unable to correct the comment because only the author or an administrator can change a Private comment to Public.

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, any Private comment that is selected by the submittal coordinator to be Shown in Review will automatically be switched to Public status so that it is visible to the entire project team.

This is the recommended configuration so that the construction team can view all information that the submittal coordinator intends for them to receive.

New Submittal Setting – Changes Private comments to Public (visible) when shown in review

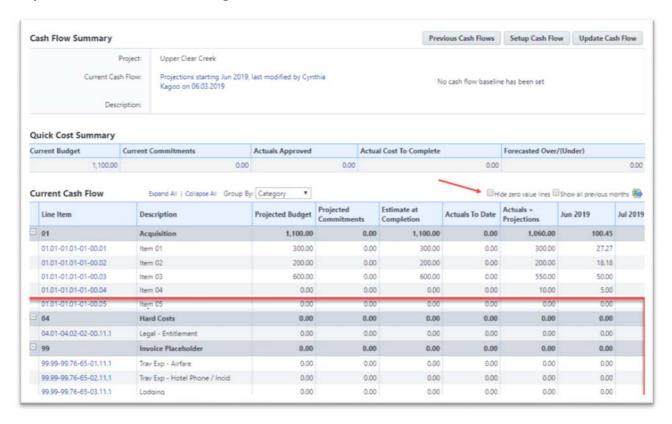


#### Cost

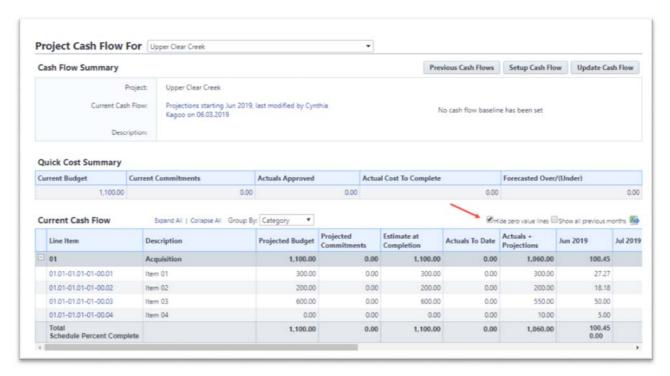
#### Ability to Hide Zero Value Lines on Project Cash Flow and Forecast Pages

Due to overwhelming request from our users to narrow the focus area in our Cost module to only those Budget Lines that have values, we have added the ability for users to Hide Zero Value Lines on our Project Cash Flow and Forecast pages. Additionally, e-Builder will remember each user's last setting on a given project's Cash flow or Forecast page, whenever that user returns to the page.

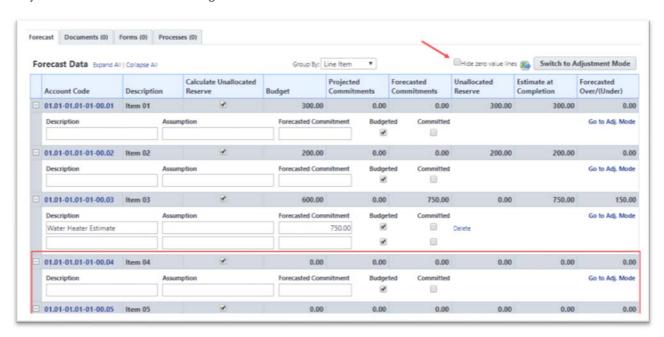
Project Cash Flow before hiding zeros



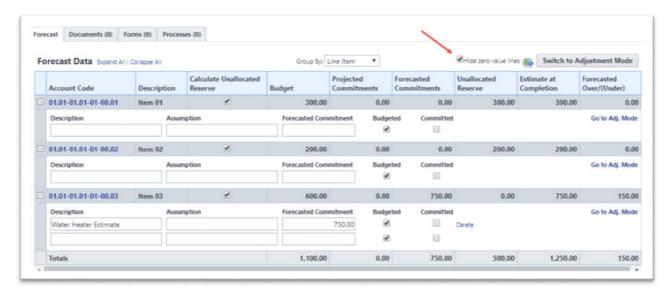
#### Project Cash Flow after hiding zeros



#### Project Forecast before hiding zeros



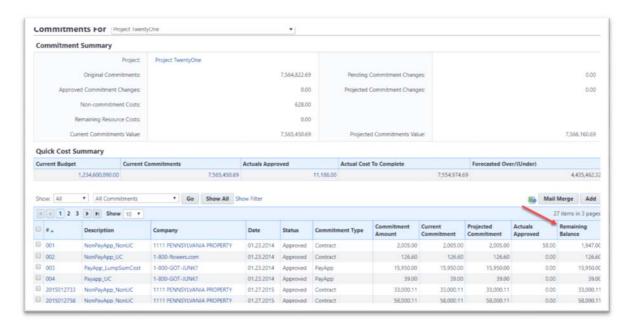
#### Project Forecast after hiding zeros



# Show Remaining Balance for each Commitment on the Project Commitment Summary Page

To provide users with a quick view of each Commitment's status in terms of Remaining Balance, we have added the "Remaining Balance" as the last column on the Project Commitment Summary page. This new column displays each Commitment's Current Value minus Approved Actuals.

Remaining Balance column on the Project Commitment Summary page

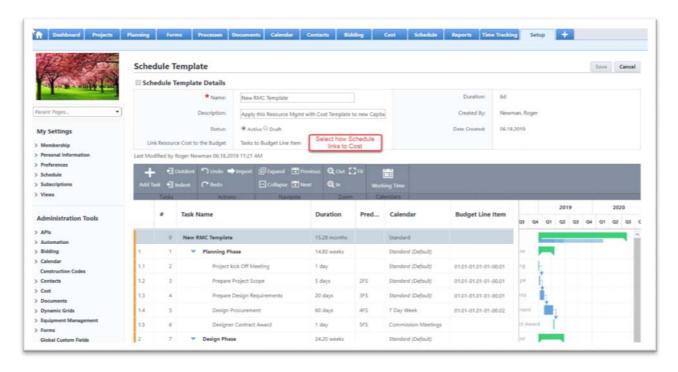


## **Resource Management with Cost**

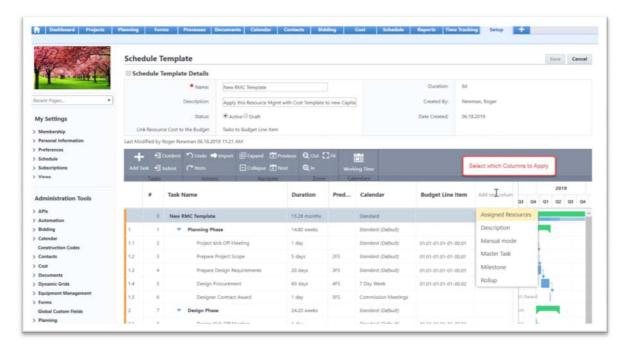
#### Schedule Template UI Enhancements

On accounts with Resource Management and Cost (RMC) enabled, Administrators will now be able to create new Schedule Templates with RMC that are much more user-friendly and visually appealing.

Select how the Schedule links to Cost



#### Select columns to apply to the Schedule Template



## **Mobile App**

#### Release 1.3.5

The following enhancements have been made to improve the performance and usability of the e-Builder mobile app.

- The Documents folder is now refreshed after uploading a new file.
- Added the ability to save a draft of a process and continue to edit the process.
- Improved the file save, print and copy functionalities.

The following bug fixes have been made to improve the performance and usability of the e-Builder mobile app.

- Resolved a bug related to taking a photo while in the draft mode of a process.
- Resolved an issue related to attaching files to a process instance.
- Resolved an issue with the process submission workflow.
- Resolved an issue with look-up fields related to dynamic grids.

## **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 <u>Technical Support</u>.

#### **API**

Case #	Resolution Notes
320679	If Process Instance Details have rich text content that is greater than 1.5MB, it may cause the API to timeout. To avoid timeout, the API results have been modified to include data overflow messages for text fields that are greater than 1.5MB.

#### **Bidders Portal**

Case #	Resolution Notes
314881	For bid packages that are using "Submit Quote" mode (such as qualifications), only one file can be uploaded. An error will now be displayed if the user tries to upload more than one file.
319966	Resolved an error that incorrectly showed bid packages as past due for the UTC 0 time zone (London).
324147	Corrected the account company name and styles issues in the New Bid Submission Confirmation email.

## **Bidding**

Case #	Resolution Notes
325222	Corrected the displayed contact information for bidders of public bids.

## Cost

Case #	Resolution Notes
315136	Optimized the code to query the master commitment line items one and to query only the columns needed. Also cached the account preference for funding enabled to query it only once.
319083	The Total Funds will now show the correct total sum of each row value after sorting on any of the columns in the grid.
320570	Resolved an issue where having more than 32,767 cost items would cause an error when going to any page other than the first page on the Master Commitment Items tab.
320754	Saving a Cost Funding Template no longer clears out the Account Funding Source for any of its Funding Sources.
323300	The Exceptions file was not loading after clicking the Export button in the Update Invoice Payment Status import wizard. This has now been resolved.
323553	Resolved an issue where an invoice with negative invoice amounts could not be voided.

# **Custom Development**

Case #	Resolution Notes
319998	Added missing columns for Commitment Invoice XML output to resolve an issue where the XML output was missing two newly added custom fields.

## **Documents**

Case #	Resolution Notes
316923	Resolved issues that occurred when using the drag and drop feature in the new File Upload tool in Chrome.

320496	An incorrect message was displayed in the Documents module for Chrome. The drag and drop feature is now displayed correctly in all browsers.
320778	Resolved an issue that caused an incorrect upload date to be displayed for versioned files in the new File Upload interface.
322005	When files are copied from one project to another, the Documents page refreshes and displays the correct project and the document tree of the project to which the files are copied.

# e-Signature

Case #	Resolution Notes
320014	Resolved an inconsistency between e-signature status in e-Builder vs DocuSign.

## **Forms**

Case #	Resolution Notes
317304	Resolved an issue that occurred with the Import functionality in Forms. This issue had prevented forms from being reopened for import.

## **Internal Admin Tools**

Case #	Resolution Notes
322485	Added validation for usernames to prevent spaces from being added when creating new users in the Admin Tool.

# **Login Issues**

Case #	Resolution Notes
318257	Fixed a broken link to the e-Builder Support page in the footer of the home page.

# Planning

Case #	Resolution Notes
317239	Resolved an issue that caused inconsistencies between the data in the exported Excel sheet and the planning graph in e-Builder.

# **Processes/ Workflow**

Case #	Resolution Notes
316457	Resolved an issue that occurred when a comment was marked Private and the status was not being saved.
321120	Resolved an error that prevented EB Admins from overriding a process instance.
321622	Resolved an inconsistency in the display format of the Role Member drop-down list. The following format will be used: "FirstName LastName".
324419	The banner that links spawned processes was not available in the parent instance. This issue has been resolved.
324949	Resolved an error that occurred when accessing existing processes.
324955	Resolved an error that occurred when accessing existing processes.

# **Projects**

Case #	Resolution Notes
323279	The project custom fields were being automatically populated in the Chrome browser.
	This issue has now been resolved.

# **Reports**

Case #	Resolution Notes
314010	Fixed the header grouping functionality of a report to ensure it is displayed consistently.
316852	The Date Received field has now been added to the drop-down list for Add Formula for General Invoice processes.
320723	An error appeared when dragging and dropping a BI report to a folder. This functionality is currently not supported.
322291	NotEqual report filters for reports now work as expected.
322614	The Print View now works as expected and the Excel file will sort dates as date fields not text values.
323847	Resolved an issue where reports that were exported to an Excel file were displaying HTML tags instead of rich text.

# **Scheduled Task Engine**

Case #	Resolution Notes
315535	Optimized the system to complete all Schedule list tasks without error.
319280	Dates were using the GMT instead of the user's time zone. This issue has now been resolved.
324182	Resolved an issue where invalid characters were used in a document description.

# Schedules

Case #	Resolution Notes
317152	Tasks set to "manually scheduled" were being treated as if they were set to "automatically scheduled" when importing a schedule. This issue has now been resolved and in the imported schedule, the tasks set to "manually scheduled" have the same start and end date as the imported MPP file.
320691	Resolved an issue that prevented the schedule from loading.
321373	Resolved an issue that prevented Schedules from loading properly.

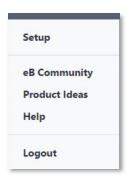
## **Submittals**

Case #	Resolution Notes
320101	Documents can now be uploaded to submittal packages, even if the packages do not contain any register items.

## **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 <a href="mailto:support@e-builder.net">support@e-builder.net</a>.