Q3 2014 Release Notes

September 18, 2014

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About the 2014 Q3 Release

e-Builder quarterly releases include improvements to a targeted area of the product and usability enhancements that increase the ease-of-use of current features and functions across the entire product. The latter is a culmination of user feedback and requests. In addition to enhancements, a list of resolved cases for the month is also enclosed.

For this release, our targeted module is Documents. After reviewing your feedback, we determined that a broad set of our clients would benefit greatly from improvements to this area. Usability enhancements from various areas of the product as well as resolved cases for the month of September are included in this release of e-Builder v.8.7.

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 Community** – The Ideas section of the e-Builder Community 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. Those with the highest vote totals are noted when forming e-Builder's roadmap. To access the Community, click the arrow next to your username within the banner of e-Builder Enterprise, and then click eB Community.

- **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

- A description of each product enhancement
- A description of each usability enhancement
- A list of resolved cases in the month of September

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
September 2, 2014	1.0	Initial release

Summary of Features and Impact to Users

Feature	Immediately Available to Users. No setup required.	Setup Required	Contact e-Builder Support to enable this feature.
Edit Documents in Place	✔		
oData API – Additional Entities		✔	✔
Auto Fill Email Addresses	✔		
Apply Template to Multiple Projects	✔		
New Version Control Permission	✔		
Copy Users when Sending Documents	✔		
New 'Document Owner' Role	✔		
Dynamic Cost Processes in e-Builder Mobile™	✔		
Saving Files via e-Builder Mobile™	✔		
Reporting on Capital Plans	✔		
Internet Explorer 11 Compatible	✔		

Product Enhancements

Edit Documents in Place

e-Builder now supports editing documents in place. In order to edit files prior to this enhancement, the document would have to be downloaded, modified in its native application, and then uploaded in e-Builder. Now, by clicking the Edit link located next to all Word, Excel and PowerPoint files in the Documents module, you're able to update and save the file without having to navigate away from e-Builder. Editing in place is also available anywhere you're able to access attachments. This feature allows you to save as you go and once you've completed your edits, you'll have to option to check the file in, at which point a new version will be created. Note that e-Builder is working with Microsoft to research an open issue making the functionality work with Office 2007, therefore it will not be supported for launch.

oData API – Additional Entities

The e-Builder oData API is an interface that allows other applications to make programmatic requests and access the objects and data in e-Builder without using the user interface. This provides your organization the power to connect or integrate multiple data sets and processes together to create a more customized solution. Below is a list of e-Builder entities, which can be queried using the API.

A preview of the new oData API became available in quarter two and it included access to a limited number of e-Builder entities. This quarter, the API will be more widely available as an account attribute in our production environment which can be enabled by contacting your e-Builder account manager. In addition to this, additional e-Builder data sources around Costs and Processes have been added to the list of options; allowing you to query more data.

Previously Available:

- Budget Items
- Budgets
- Cash Flow
- Cash Flow Items
- Commitment Change Items
- Commitments
- Invoice Items
- Invoices
- Projects
- Users

Newly Added:

- Budget Changes
- Budget Change Items
- Process Types
- Process Instances
- Process Line Items
- Forecast Items
- Forecast Item Details

- Forecast Item Adjustment
- Dynamic Cost Items

To learn more about the e-Builder API, see contact your account manager and see About e-Builder oData API in the e-Builder Online Help.

Usability Enhancements

Auto Fill Email Addresses

It is common for e-Builder users to email a standard set of individuals daily to relay messages; request comments; and to send and receive documents. Previously, users were required to lookup, filter for and select each recipient every time an email was being sent. For added convenience, email addresses will now automatically populate as the contact or user's name is being entered; thereby reducing a three-step process to a single step.

ℹ *Tip: The keyboard can be used to select and enter desired email addresses. After you start typing, use the arrows to highlight the email of choice, and then click Tab to make the selection.*
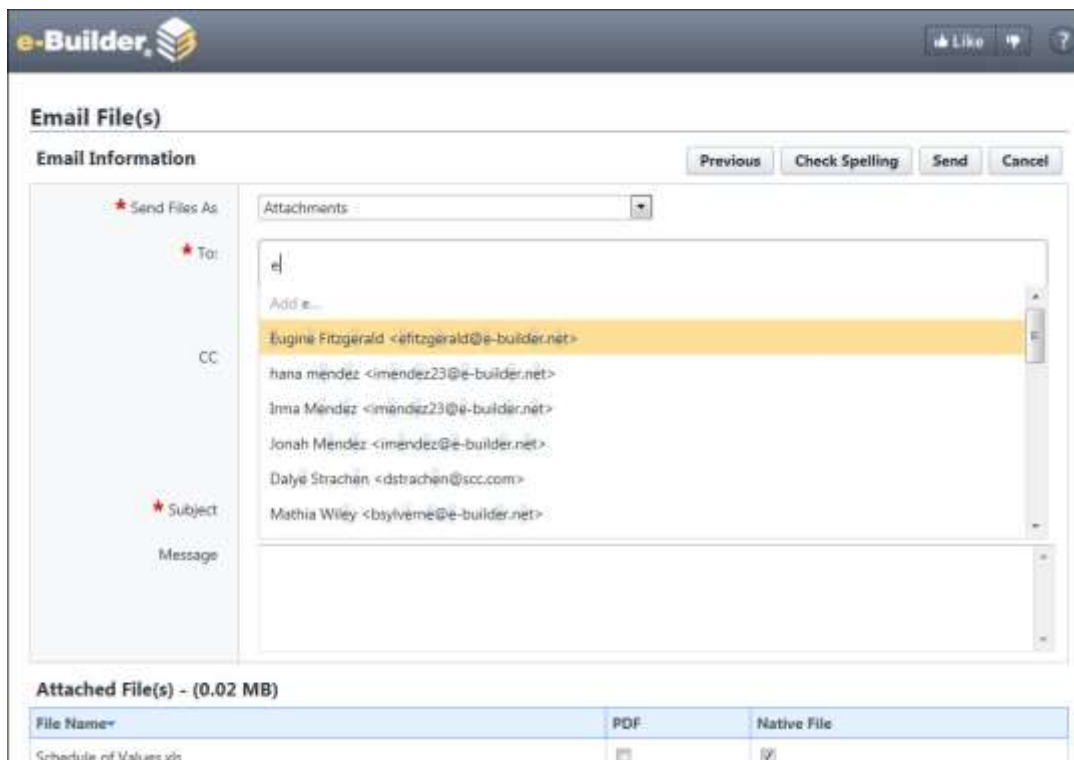
Auto fill email addresses are now available everywhere email exchange is possible, and specifically when completing the following actions:

- Sending documents
- Requesting comments in processes
- Requesting comments in forms

- Emailing and faxing
- Sending submittals
- Sending meeting minutes
- Forwarding for review

Apply Template to Multiple Projects

Project templates give administrators a convenient way to jump start a project by setting up the documents folder structure and associated permissions; and applying available templates from other e-Builder entities. A limitation to this feature was the inability to apply project templates to multiple projects at a time. When document permissions change, as they often do, or when template structures are updated, applying the template to every single project was time-consuming, especially when the program had a large number of projects.

e-Builder Enterprise™ now enables you to apply project templates to multiple projects at once. Projects are queued as the template is being applied and an email is sent to the administrator upon completion – allowing them to continue working as the process is completed.

This update will help managers save time and effort. For example, an update to the folder structure across 10, 20, 30 or more projects would require significant effort as each project would have to be updated individually. This enhancement allows you to accomplish the same outcome with a single template update.

New Version Control Permission

The 'Modify' Documents permission allowed users to create a new version of a file. This allows the user to modify the folder name and description. This was problematic when there was a need to separate folder permissions from document permissions.

To provide this flexibility, a new 'Version Control' permission has been added, which allows users to update different document versions. The previously existing 'Modify' permission is still available, except now it only allows users to modify folder name and description. Those who previously had this permission will automatically inherit the 'Version Control' permissions as well, to ensure that existing levels of access remain unchanged.

To learn more, or make changes to document folder permissions, see Folder Properties – Permissions Tab Overview in the e-Builder Online Help.

Copy Users when Sending Documents

When sending drawings and related documents to colleagues, it is often beneficial or necessary to copy members of the management team to ensure accountability. A CC field was not previously available when sending files, which compelled users to send files to recipients who would have otherwise been copied. This inability to copy users caused unnecessary confusion. From the recipient's perspective, being addressed in the 'To' field gave the impression that action was required of them, as opposed to the informative implications of being copied on an email. A CC field is now available when sending documents. This will allow authors to clearly distinguish when recipients are being directly addressed and when they are simply being informed.

New 'Document Owner' Role

To mitigate potential security concerns, a 'Document Owner' role has been added as a default role for folder permissions. The permissions of this role can be modified as necessary; allowing administrators to determine the privileges of the document originator on a folder-to-folder basis.

Potential security concerns arose because document originators (the person that uploaded the file) were able to delete the original file and all subsequent versions, without having 'Delete' permissions. For example, if an administrative assistant added new shop drawings, they could delete all versions of these drawing, even though they had no involvement in the proceedings; simply because they uploaded the original file.
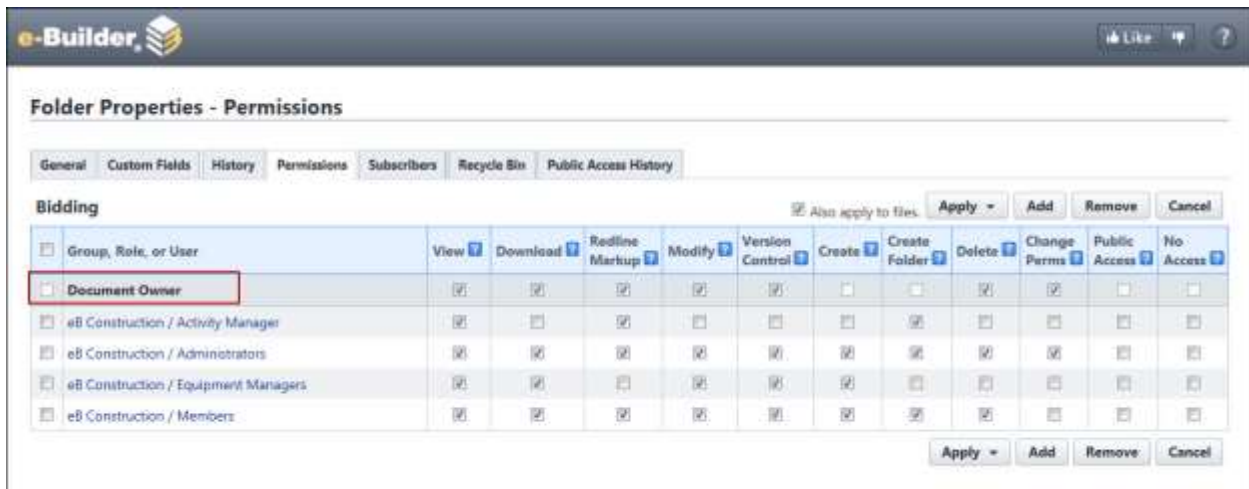
Dynamic Cost Processes in e-Builder Mobile™

Dynamic cost processes are now supported in e-Builder Mobile. Dynamic cost processes are those that incorporate dynamic cost columns, which are user-defined cost columns that appear in the Cost Summary. The addition of dynamic cost processes allows you to view and take action on all process workflows from the e-Builder mobile application. To learn more, see About Dynamic Cost Processes in the e-Builder Online Help.

Saving Files via e-Builder Mobile™

When an email attachment was opened using a mobile device, such as an iPhone, iPad or an Android product, you were unable to save the file to e-Builder using the e-Builder mobile app. Now, when an attachment is opened using a mobile device which has e-Builder Mobile installed, e-Builder will be an available option with which you can open and save the file. This feature supports the convenience of mobile capabilities.

Reporting on Capital Plans

A new Planning report is now available. The report allows you to report on multiple capital plans. This reporting capability reduces the time it would have previously taken to gather plan data; allowing executive team members to make informed decisions quickly and accurately.

Program managers with more than one capital plan previously had no way to report on multiple plans and scenarios. For example, a higher education program with 50 campuses may have a capital plan for each campus. Managers who needed collective and individual data were unable to generate these details in a single report.

Internet Explorer 11 Compatible

An update has been made so that the application is now compatible with Internet Explorer 11.

Resolved Cases

The following is a list of resolved cases for the month of September. 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	3
Calendar	5
Cost	5
Documents	8
Equipment Manager	1
Forms	5
Planning	2
Processes	15
Projects	1
Reports	6
Schedule	1
Submittals	2
Users	2

Bidding

Case Number: 00105980

Previously, when the user clicked on the 'forgot password?' link from the bidder portal's page and filled in all of the requested fields, the user would receive a notification which would link them back to e-builder instead of the bidder portal page. This is now fixed and the user is routed to the bidder portal page.

`**Case Number**: 00107772

Previously, we didn't have proper visual design of the Questions/Responses Tab. This has now been corrected and the page has been updated to match the original mockup of the tab.

Case Number: 00112077

Previously, importing an export from another Bid Package would result in an error on the Import Bid Scope page. Now, the Import Bid Scope functionality is working properly and causing any errors.

Calendar

Case Number: 00108394

Previously, when a Meeting Item was updated this resulted in the Action Items being removed from the Meeting Minutes field in the database (FormList). This was causing the Action Items to not appear in the mail merge. Now, the field is being populated properly and thus the mail merge action items will appear.

Case Number: 00111288
Previously, the calendar meeting minute template could not be downloaded for certain names. Now, the template can be downloaded for all document names.

Case Number: 00112053
Previously, a user who had access to meeting minutes but declined an event would get an error when trying to send the meeting minutes. Now users who have access to meeting minutes may send them even if they decline the event.

Case Number: 00115049
Previously, a calendar meeting item was defaulting the status to Closed when being edited by a user. Now, the status will default to the current status of the item.

Case Number: 00111072
Previously, when saving numbered lists that were copied and pasted into the text box, the numbers were automatically updating to match the default numbering. Now, if the numbering has styles when pasted into the text field, they will not be updated.

Cost

Case Number: 00105712
Previously, the details of a commitment change were showing different values than when editing the same commitment change. Now the advanced funding matches between view and edit mode.

Case Number: 00107189
Previously, there was an inconsistency between the values when a user would be viewing the funding distribution amount and editing a funding distribution. They would show two different values. This is now fixed and the system correctly displays the same values in both cases. It also properly validates the amounts after the totals are added up.

Case Number: 00108764
Previously, the system would display two different values to a user viewing a funding distribution and when editing the funding distribution. Now this is fixed to correctly display the same values in both cases. The system will also properly validate the amounts after the totals are added up.

Case Number: 00112645
Previously, the Funding Distribution Total did not change color properly in Chrome. Now, if the total does not add up when updating the values for the funding sources, the text will change to red.

Case Number: 00112933

Previously, after a user removed cost item attachments, the document still appeared to be attached. When a file was being undeleted and another file exists in the same folder with the same name, the page would refresh showing a red error banner at the top telling the user that the file could not be deleted, but the links below the filename and the checkbox next to the file would become enabled as if the file was successfully undeleted. Now when trying to undelete a file, an error alert box will appear telling the user the file cannot be deleted and the links below the file will be disabled.

Documents

Case Number: 00106716

Previously, an error appeared when a user saving a stamped file as new version did not have version control permissions to the file. Now the 'save as new version' button will no longer be available to users who do not have version control permissions to the file they are stamping.

Case Number: 00106819

Previously, when a user saved a stamped file as new document, the system would save it as a new version even when the user does not change the name of the file. Now, the file saves with automatically updating the name to append a number to the end of the file name. If the user wants to update the version of the document then they must use the 'save as new version' button.

Case Number: 00107115

Previously, if a user with no version control permissions moved a file to a different folder where that file already existed, the user was given the impression that the file was successfully moved when it was not. Now the user is notified via an error panel of their missing permissions.

Case Number: 00107180

Previously, an error appeared when a user with no create permissions to a folder tried the save as function when stamping a file. Now if user opens files in a folder which they do not have create permissions, it will require them to update the folder to save. There is validation text below the folder path to tell them the folder they have selected is invalid to save to.

Case Number: 00109977

Previously, when a folder was public, the system would only show the public file link to superusers. Now the Public folder links are now available for all users if the folder is public both in file and folder properties.

Case Number: 00112023

Previously, when a user would hover over the bottom left corner of a stamp in Internet Explorer, the tooltip was showing the time stamp in GMT time zone instead of the user's time zone. Now the time zone is converted to the user's time zone.

Case Number: 00114140

Previously, when saving a new document stamp with selected users only having permission to use it, the page would show an error message that would indicate that it could not find the selected users entered. Now, the selected users are found and the stamp saves successfully.

Case Number: 00116958

Previously, the project dropdown for accounts with greater than 1500 projects would not properly navigate to the selected project. Now the project drop down properly switches projects.

Equipment Manager

Case Number: 00109329

Previously, the equipment manager dropdown list would show the user projects to which they didn't have equipment manager permissions. This would cause the page to display an error when these projects were selected. This is now fixed and those projects are filtered out.

Forms

Case Number: 00109112

Previously, an error appeared when clicking save on a form instance when the user clicking save does not have permission to view a required private field type. Now, when the user clicks save on a form that has a form field that is private, no error will occur.

Case Number: 00109127

Previously, date due in the notification and date in the comment of a form instance is appearing as a guid. Now it is correctly displayed.

Case Number: 00110004

Previously, form notifications showed the wrong Date Due value. This would occur since the system was converting the date to the user's time zone even if there was no time component. Now, we only convert it if the time component is present.

Case Number: 00115678

Previously, when a user was replying or forwarding a form and attaching files directly to the form via drag & drop, the files were not attaching and an error was being displayed. Now, attaching files via drag & drop when forwarding or replying will correctly attach the files.

Case Number: 00116736

Previously, files attached to forms with a setting for 'require folder for attachments' set to 'NO' are no longer visible. Now this is corrected and user is able to view file.

Planning

Case Number: 00111642

Previously, an error appeared when editing a working scenario. Now the data fix will allow the date to load and displayed properly.

Case Number:

Previously, decimal places were not allowed in unit cost fields within the planning module. Now users can enter decimal numbers in unit cost. The numbers will round to two decimal places after user has finished inputting number.

Processes

Case Number: 00084582

Previously, users were unable to load a workflow diagram in IE10. This is now fixed and users are able to upload a workflow diagram.

Case Number: 00104491

Previously, custom fields on line items were not being validated when saving or submitting a commitment change process instance. Now any non-zero amount line items are now properly validated and the user is informed if any non-zero amount line items are missing required custom fields.

Case Number: 00105667

Previously, if the print, check spelling, or copy buttons were clicked on a process instance while the page was loading, an error appeared. Now when the page is loading due to a user action, the print, check spelling, and copy buttons will be disabled.

Case Number: 00106455

Previously, when the funding distribution on new scope commitment change item is done by amounts (instead of percentages), the funding distribution was being populated as all zeroes on the change item popup. Now, the funding distribution will be the same in the change item popup as it is in the change items grid on a commitment change process.

Case Number: 00108860

Previously, the Mail Merge output was set to Japanese. Now the Mail merge automation step will output the proper file extension when mail merge template is set to use .doc

Case Number: 00110273

Previously, users attempting to take the approve action would receive a displayed error. Now the error is no longer displayed.

Case Number: 00110971

Previously, an error appeared when attempting to publish a workflow. Now the publish will work without error.

Case Number: 00111322

Previously, Internet Explorer 11 error occurred when clicking the add item link on a dynamic budget\commitment line item process. Now the IE11 compatibility issues has been fixed.

Case Number: 00111334

Previously, an error appeared when a user would copy a cost process with allowance items. Now, the process copy functions without issue.

Case Number: 00111479

Previously, when an actor in a process delegates to a user, if that user is incorrect or cannot perform the duties, there was no way to re-delegate to someone else after the first delegation. This process has been improved to allow re-delegation. Now only the user who was delegated to can re-delegate to another user. If a user has been added as a step actor because of this delegation, they will be removed from the list of available users to delegate to. If a delegated user were to decline ownership, the person who delegated to them would then be able to re-delegate out to someone else who's not already a step actor.

Case Number: 00111697

Previously, when editing a process layout with a cost integration component, the user could get the layout designer in a state where they could add the same cost integration multiple times to the same section. This caused processes using that layout, as well as the preview for that layout, to not function. Now when admins go to add or edit a layout with cost integration, they should no longer be allowed to do this.

Case Number: 00111709

Previously, when a user taking an action on a process for the mobile app, that process would show a status of Not Assigned after the action was taken. Now taking an action on a process from the mobile app will now maintain the appropriate status instead of forcing it to Not Assigned.

Case Number: 00112171

Previously, starting a new instance of a process with a default folder set for the attachments and the setting for 'allow user to change folder' are unchecked. The instance would honor the setting until it was saved. Then it would allow users change the folder. Now, the settings are always honored.

Case Number: 00116444

Previously, some commitment change items numbers that are editable will not print. Now the user can print these items.

Case Number: 00116824

Previously, when taking action on an invoice process that went through multiple conditional branches, the workflow would fail to move the process into the next step. Now the workflow can process invoice processes through multiple conditionals.

Projects

Case Number: 00108928

Previously, when adding a user to a project and sending the notification, the message history text did not reflect the contents of the notification. Now this has been resolved by masking the projects.

Reports

Case Number: 00108107

Previously, the Matrix report displayed Grand Totals by Status as a numeric value and not as the proper status. Now, the report displays the proper status.

Case Number: 00108748

Previously, funding source cost reports would display an error due to parameters missing. Now this has been fixed and the report now runs as expected.

Case Number: 00111930

Previously, the weblink reports would not take in a value other than an number. Now, the weblink formulas will allow numeric or text.

Case Number: 00112099

Previously, any formula that produced a string value was being limited to 30 characters. This has been addressed and now we no longer will limit the number of characters produced by a formula.

Case Number: 00112451

Previously, Process Log reports (specifically processes with cost integration of Dynamic Commitment Line Items) were being limited to only report on instances with Commitment Line Items. Any instance with Line Items would have been omitted from a report. This has now been corrected and will return all process instances, regardless of having Line Items or not.

Case Number: 00112704

Previously, when adding the 'Adjustment Amount' column to process line item reports would cause an error. This is now fixed.

Schedule

Case Number: 00115970

Previously, the scheduled Task durations were incorrect when imported into the system. The Import Schedule duration calculation was using 24 hours, instead of the Hours Per Day identified at the project level. The Import Schedule now uses the Hours Per Day for the duration calculation and the Predecessor Project field is now mapped properly.

Submittals

Case Number: 00116731

Previously, an error appeared when accessing the Submittals module if there were any documents attached to any items. This has been resolved and users are successfully able to access the module.

Users

Case Number: 00109413

Previously, the Set Up Admin was unable to create field dependency with fields of different object types. This has been resolved and users are now not able to create field dependencies between fields of different object types.

Case Number: 00113966

Previously, when an admin tried to delete a Project Role Template from the Setup/Admin area, an error would display. This would stop the user from being able to delete the template. Now, admins will correctly see the confirmation window that is displayed after they select the template(s) for deletion.