Q3 2019 Release Notes

OCTOBER 18, 2019

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Q3 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

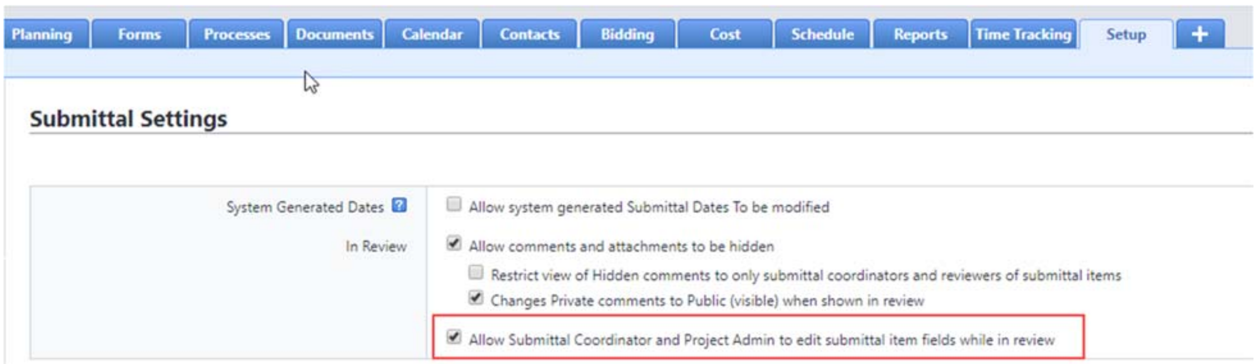
The following is a list of enhancements included in the release. If you have any questions regarding this release, please contact e-Builder Technical Support.

Submittals Module

Edit Submittals Capability

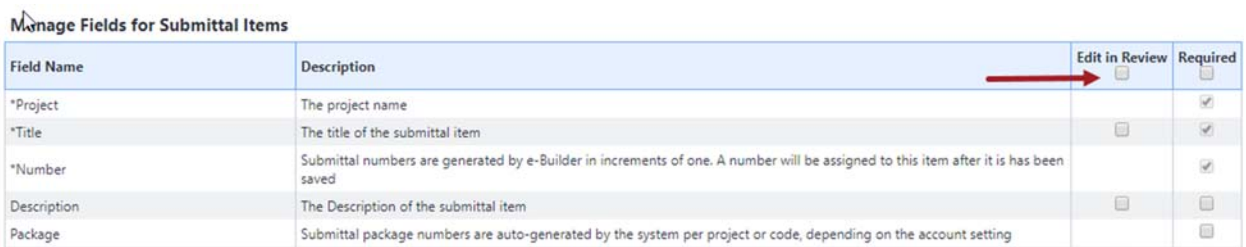
A new submittal permission “Allow Submittal Coordinator and Project Admin to edit submittal item fields while in review” has been added.

Edit in Review Submittal Setting



Previously, when a submittal is sent to the Submittal Coordinator, none of the identifying information could be edited.

With this change, the Administrator can allow the Submittal Coordinators and Project Administrators to edit specific fields after the submittal item has been sent for review.



Note that certain fields that are required by the system or are auto-assigned are not available for editing.

At the package level, the Submittal Coordinators and Project Administrators can now edit descriptive information (such as Title) when all items inside the package are in review. If some of the items are in the court of an Add/Edit team member, then the package will not be available for editing.

Submittal Comments Added Through Actions Include Private Checkbox

Previously, when Submittal Comments were added through certain action buttons (such as Review Complete OR Forward for Review message box), the Private checkbox was not available. The commenter had to be careful to switch the status to Private as a separate action.

The Private checkbox has been added to any location where comments can be created through an action. If a user is not in the Submittal Private Comments list, then the Private checkbox will not be displayed.

New Private Checkbox

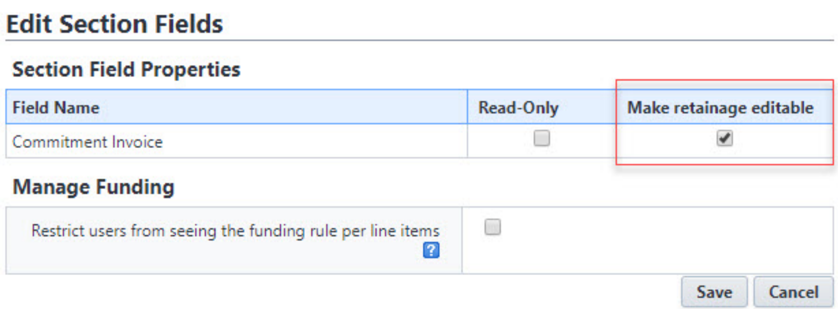
Cost Module

Allow Manual Retainage Entry for Commitment Invoices in the Draft or Received Status

Created a new feature that allows commitments to be designated to allow invoice Retainage Amounts to be manually edited when the invoice is in the Draft or Received status.

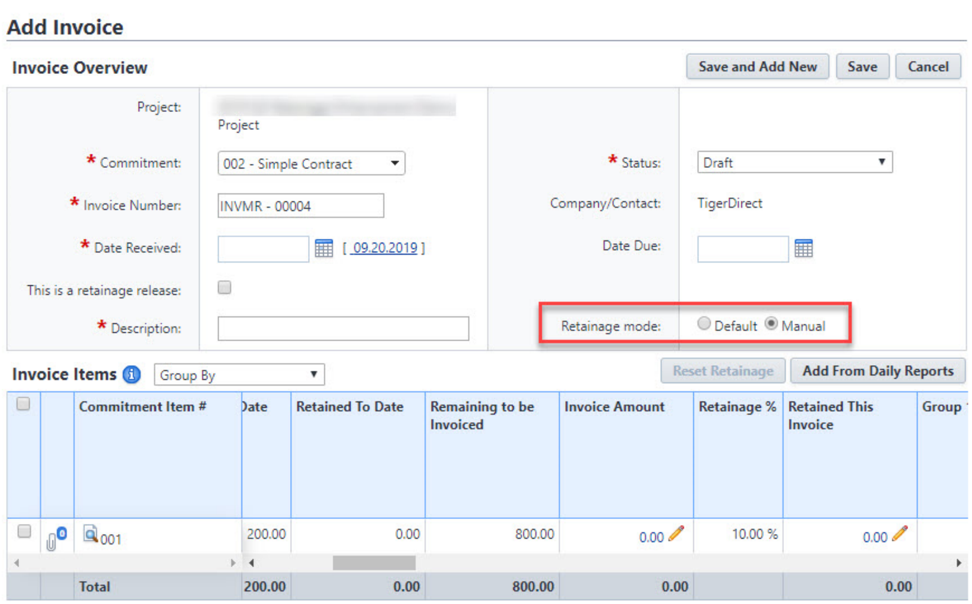
On Commitment Invoice processes, this new feature must be enabled using a new Layout configuration setting, which is in the Commitment Invoice Section Properties.

New Make Retainage Editable Checkbox



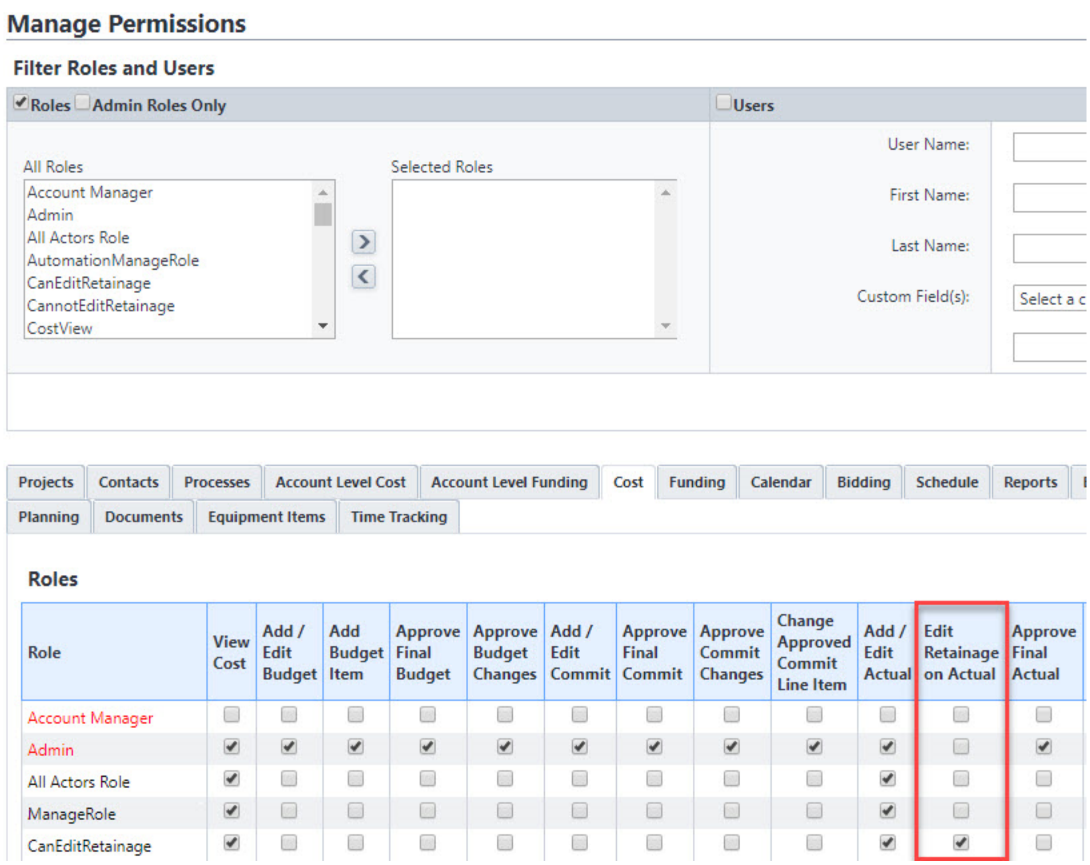
On manually created invoices, this feature is available on the Add or Edit Invoice pages for those Commitments designated to allow manual retainage entry.

New Retainage Mode Selection Option



Note: This feature is displayed only for users with the new "Edit Retainage on Actual" Cost permission enabled.

New Edit Retainage on Actual Permission



Schedule Module

Resource Management Fields Added to Account-level Schedule Views and Task Views

- On accounts with Resource Management (RM) or Resource Management with Cost (RMC) enabled, updated the Account level Schedule Views and Task Views to include RM or RMC fields.
- On accounts with Resource Management (RM) or Resource Management with Cost (RMC) enabled, updated Standard Reports to include RM or RMC fields (released previously during the Quarter).

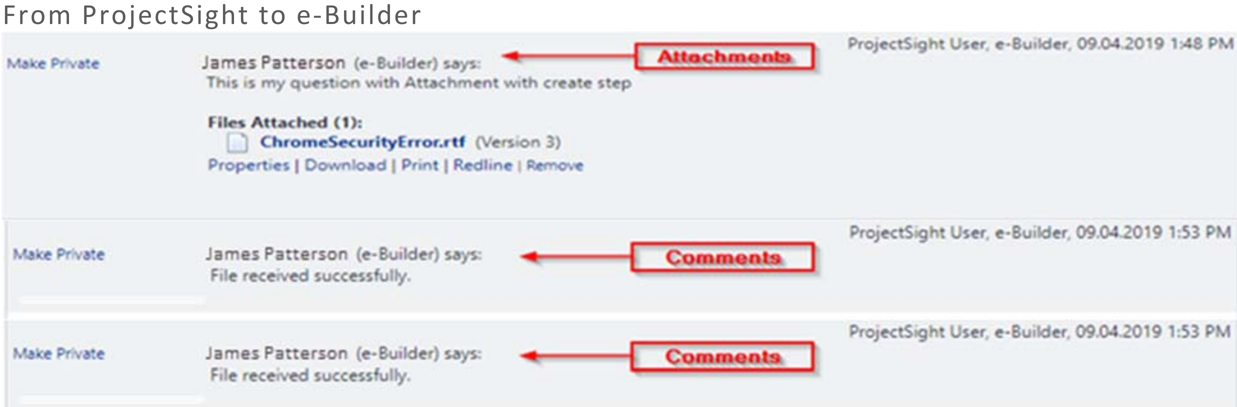
Connected RFI

Display Actor Information

- When an Actor takes an action within a shared RFI between ProjectSight and e-Builder, the Actor's first name, last name and company will also be shared between the two systems.

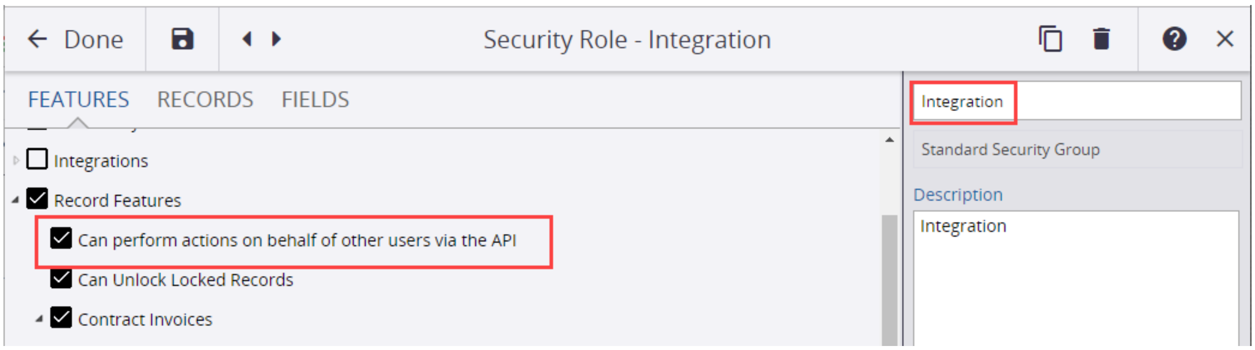
- Customers will now be able to identify the individual taking an action when the RFI is created, comments/attachments are added to the RFI and with the owner response is made.

From ProjectSight to e-Builder



From e-Builder to ProjectSight

- The capability will be available out of the box for RFIs viewed within e-Builder but will require configuration before being visible within ProjectSight.



e-Builder Multi-Project Support

The integration now supports multiple connected projects within an e-Builder Account.

Owners can now have multiple projects within the same account, running in parallel, leveraging the Connected RFI solution and sharing the same RFI process.

After the onetime configuration needed for the 1st project on an account, each additional project can be added by providing the new Project ID and new Project Number to ProjectSight.

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.

Bidding

Case #	Resolution Notes
337770	Rectified an incorrect URL in the request for access email sent to bid contacts.

Business Intelligence

Case #	Resolution Notes
291545	Resolved an issue caused by a third-party component that affected the BI dashboard filters.
299110	Resolved an issue caused by a third-party component that prevented uses from accessing multiple reports that were filtered by a category.
308830	Resolved an issue caused by a third-party component that affected the reports' column formatting after they were generated as a PDF.
315563	Resolved an issue caused by a third-party component that affected how reports and the dashboard where running.
320607	Resolved an issue caused by a third-party component that affected how reports were working when categories were selected.
322459	Resolved an issue caused by a third-party component that affected BI dashboards.
323862	An issue causing the BI PDF export to be different than in the BI preview has now been fixed.

Calendar

Case #	Resolution Notes
315672	Previously, when adding open items for a recurring meeting, only items from "Public" events were available. Now, the list of open items also includes items from "Private" events.
321910	Previously, when sending meeting minutes, if a user typed bullet points in the "Message" section of the Send Meeting Minutes pop-up, the meeting minutes were not sent. Now, the system successfully delivers the meeting minutes with bullet points in the "Message" section.
326827	Resolved an issue that prevented users from receiving notification emails from meeting minutes.

Companies/ Contacts

Case #	Resolution Notes
337859	Optimized the query to avoid timeout errors. Now, the optimized query completes immediately.

Cost

Case #	Resolution Notes
329990	Previously, if there was a negative value in either the Invoice Amount or the Funding Source Amount, it caused issues with cost validation. Now, the system detects if the Invoice Amount and Funding Source Amounts both contain negative values and validates accordingly.
330642	When using cost data entry to import commitment changes, users can now import Commitment Change custom field values even if all rows in the import file are new scope items.
330977	Updated the Unit of Measure and Unit Cost column for commitment items in which these values were missing.

332177	Corrected the sorting order of "Commitment Item #" on the Add Commitment Invoice page to follow the sorting behavior of "Commitment Item #" on the Edit Commitment Invoice page.
339483	Corrected the 'Current Payment Due' value on a downloaded Schedule of Value sheet.

Custom Development

Case #	Resolution Notes
333126	When the budget line item didn't have a value in the Account Number custom field, the code was crashing. This has been resolved.
336164	The function creating the schedule was not applying the calendar settings from the schedule template. This has been corrected.

Dashboards

Case #	Resolution Notes
288803	Resolved an issue caused by a third-party component that affected how filtering was working.
317787	Resolved an issue caused by a third-party component that resulted in an error when clicking on a pie chart in the dashboard.
328853	Resolved a dashboard issue that showed 4 decimal places in the column instead of 2 places as in the associated report.
333068	Resolved a Dashboard issue with refreshing reports.

Documents

Case #	Resolution Notes
331231	When uploading a file using Chrome, document custom field values from the parent folder were not being copied to the uploaded file when values are set for a document type. Now, if a parent folder has document type configured and custom field values, it will be copied when the file is uploaded.
338633	Resolved inconsistencies in downloading document files on submittal items in certain browsers.

Forms

Case #	Resolution Notes
329269	Resolved an issue that prevented users from modifying a Forms view. The fields 'Held By First Name' and 'Held By Last Name' in the filter were not loading the criteria dropdown list values causing the Save action to fail. Also, fixed a similar issue in the account process view with the fields 'Site Administrator First Name' and 'Site Administrator Last Name' project fields.

Mobile App

Case #	Resolution Notes
323593	While using the iOS app for Action Items, the user was prompted to select a folder for uploads even though the folder was pre-set in the configuration. However, this configuration works as expected on the full e-Builder desktop version. This issue has now been resolved.
333176	The default value of the Standard Process field "Date Due" was not recognized in the mobile app. This issue has now been resolved.

oData

Case #	Resolution Notes
330750	Updated the "Responsible Actors" field in oData to populate the correct actor(s) as listed in e-Builder

Planning

Case #	Resolution Notes
333703	Resolved truncation inconsistencies on values in the Project Scenario formulas.

Processes/ Workflow

Case #	Resolution Notes
319598	Previously, for Master Commitments, it was possible to create a Project Commitment Item number that duplicated an existing Master Commitment Item Number. However, the duplicates would cause errors when trying to Save. Now, users will receive an error message when trying to save a duplicated commitment item number, with a clear explanation.
327991	Process mail merges were unsuccessfully attempting to merge attachments that were connected to deleted comments. These attachments will now be bypassed by the merge automation.
328872	For process data field files, users who are not a member of the project will no longer have links to download or view the document.
329586	In the file uploader for processes, the selected documents were displaying the original uploader and date/time. This screen will now show the most current version information.
329732	Resolved an error that caused multiple instances of the Change Order Process to go into code step error after review. Added the required fields existing check.

330359	Mail merge was failing since the instance was created on the master project, while the documents attached were for other projects. Code is corrected so that it will not fail while doing mail merge for attached files from different projects.
330472	When adding a process drop-down field and setting project level field options, the Admin was not seeing all projects the person was an administrator for.
330532	When importing project level field options for process dropdown fields, the system will show an appropriate error message if the project name is not found in the import.
330562	In certain circumstances, instance actors were able to retry step execution after code had failed. This will now be restricted to admins.
330776	A process could not be forwarded to another user because the user was forced to complete dynamic grid required fields. Now, the dynamic grid required fields will not be validated until a forward action is executed.
331105	The error message received by a user will be more specific in the case of a server timeout.
331459	Updated the code to log corrupted files in the comment area. The mail merge will continue to fail if there are any corrupt files.
332463	If the process initiator is an account admin or tech support, and the process is imported with the step actor set to be the process initiator, then that account admin/tech support user was not being added as an actor to that step. This issue has been resolved and now the account admin/tech support user will get added as an actor when instance is moved to the next step through the import process.
332466	Resolved an issue with user permissions to view all process instances. Now, users with the permissions to only view draft instances will not be able to view submitted instances.
333261	Previously, adding or updating the Master Commitment to an existing commitment in pending status was not creating or updating the master commitment items. Now, the system works as expected.
333746	Dynamic grid items can now be imported into public process pages.

337349	Resolved a cache issue that prevented invoice items fields from loading properly in a process instance.
338437	When the automation setting of custom code step was empty, this caused the automation step to fail. This issue has been resolved.

Projects

Case #	Resolution Notes
330772	IE 11 had performance issues if the dropdown had a large list of values. The Process page freezes or crashed in IE. Code is optimized so there is no delay with page load and interactivity in IE 11.

Reports

Case #	Resolution Notes
323859	Resolved an issue caused by a third-party component that caused inconsistencies when exporting the report to PDF.
327871	Resolved an issue in the BI report where the date fields were being treated as text instead of dates.
329237	Resolved an issue causing inconsistencies between the ad hoc report and the subscribed report.
329707	Resolved a report filter issue that prevented a less than or equal to filter from displaying all the records that should be part of the report. This issue occurred only when the formula also contained a Master Task Number field in it.
329930	The Due Date value in process reports is now fixed and utilizes the user's time zone correctly.
330250	When creating or editing a Cost report, the "Allocated Forecast" filter has been renamed to "Forecasted Commitments" for consistency.

330521	Modified the standard reports "Print View" output (ExportStyles.css) to match what is shown in the web browser more accurately. The results may still vary slightly depending on a user's display settings/Excel version.
332712	Modified the Tab-delimited Report export output type to use the existing styling for decimal values found in Excel exporting. This does NOT change the output of comma-separated (CSV) reports to fix a similar rounding issue because of concerns that this could potentially break customer integrations.
333141	Resolved an issue where the subscription reports in the spreadsheet format were not working as before and the color codes were not showing up correctly.

Scheduled Task Engine

Case #	Resolution Notes
320470	Importing contacts through a scheduled task was handling the "Do Not Use" field differently than a manual import. The scheduled import is now consistent.
329711	Resolved an issue where the import folder was only processing one file from the import folder when the scheduled task ran. Now all files that are in the import folder will be processed properly.
333868	When a scheduled task is re-enabled, it will now calculate the next run time based on the schedule and not run the task immediately. The task will now run as per schedule.
333933	When calculating the next runtime for a scheduled report, the last runtime was not being used, so the calculation was wrong when re-enabling a scheduled report. Now, the last runtime is considered, and the next runtime is properly set. If the report has no last runtime value, the assumption is the last time it ran was the day before and the next time is calculated based on that. If a report is re-enabled and it should have run the present day before the time it is being enabled, it will run automatically, otherwise it will run according to schedule.

Schedules

Case #	Resolution Notes
328142	Previously, when importing a schedule, certain task fields were not being automatically mapped. Now, the field auto-mapping works correctly.
330383	Updated schedule behavior that was causing saving errors by correcting dependency relationships to ensure that a task's Start Date is always less than or equal to its Finish Date.
331095	Now the dynamic grid required fields will not be validated until a forward action is executed.
331193	Resolved a bug which occasionally allowed the WBS Code to be blank when viewing Task Details.
331445	Resolved an issue that prevented saving of schedule snapshots.

Settings

Case #	Resolution Notes
327072	Previously, the Items Pending Approval section of the home page was not showing account level cost items according to the defined account level cost permissions. Now, the defined account level cost permissions are honored.

Submittals

Case #	Resolution Notes
326416	Resolved an issue that prevented the user from being able to open redlines.
	In certain circumstances, private comments were included on the submittal package transmittal form. This has been corrected.

User Setup

Case #	Resolution Notes
332705	When filtering on the Manage Users screen, the Enter key was not performing the filter. The default action of the Enter key has been restored.
337484	Previously, when trying to update custom fields, account expiration, or set a user restricted to documents, those user detail changes would not be saved. This error has now been resolved and the changes should save as expected.

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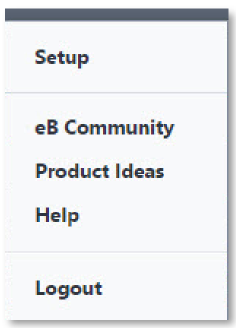

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