



# Release Notes

**SEPTEMBER 17, 2020**

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## 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.

### Security

#### **Technical Support Access setting**

For confidential projects, project administrators can block e-Builder employees from having access to individual projects under the Project Details > Settings tab.

In this release, account administrators can easily manage access to multiple projects at once from the Security page (Settings > Administration Tools > Settings > Security) instead of editing projects one at a time.

**Note:** This page was renamed from 'Password Policy'.

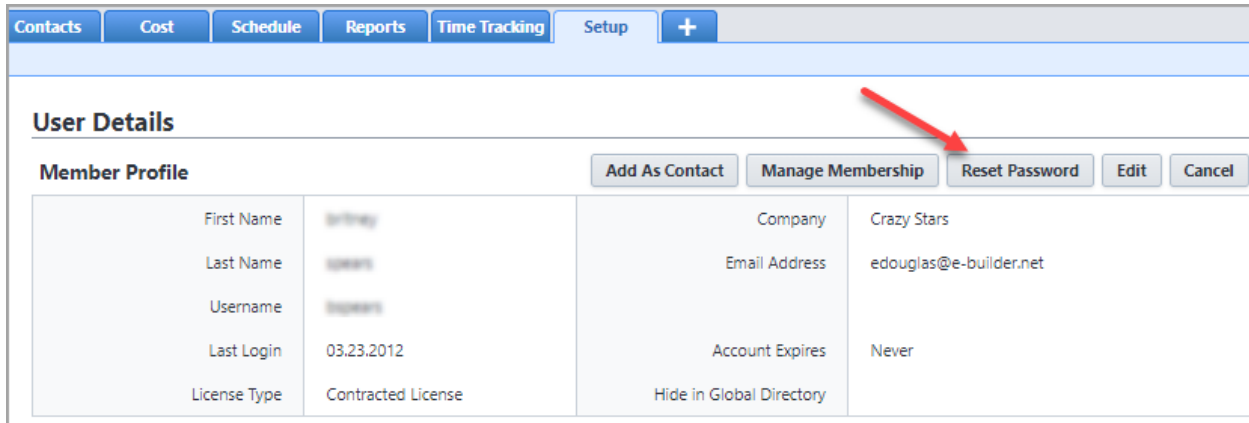
From the 'Allowed' column, select the projects that you wish to block from Technical Support access and move them to the 'Denied' column.

The screenshot displays the e-Builder user interface. At the top, a navigation bar includes tabs for Dashboard, Projects, Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, and Setup. Below this is a 'Recent Pages...' dropdown menu. On the left, a sidebar titled 'Administration Tools' lists various settings, with 'Security' highlighted and a red arrow pointing to it. The main content area is titled 'Security' and contains two sections: 'Password Policies' and 'Technical Support Access'. The 'Password Policies' section lists four settings: Minimum Password Length (No restriction), Password Complexity Requirements (No restriction), User Passwords Expire Every (Never expire), and Password History (No passwords remembered). The 'Technical Support Access' section features two columns: 'Allowed' and 'Denied'. The 'Allowed' column contains a search bar and a list of project names: ABC Wing, Account Admin - QA Production Release, Document Proposed, Draft Budget, H&S21, and Hudson Yard. A red arrow points to the 'Technical Support Access' header.

## Reset User Password

Previously, e-Builder administrators could only reset user passwords if the user locked their account with too many failed login attempts. Any other situation generally required contacting Technical Support to request a password reset.

e-Builder administrators now have the ability to reset user passwords from the User Details page at all times. This button triggers an email to the user for resetting the password and bypasses the user's security questions.

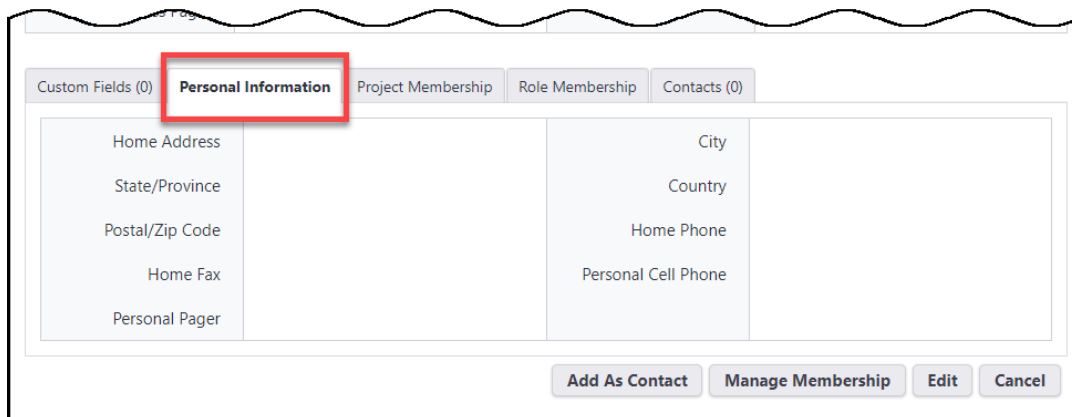


The screenshot shows the 'User Details' page for a user named 'edouglas'. The page has a navigation bar with tabs for 'Contacts', 'Cost', 'Schedule', 'Reports', 'Time Tracking', 'Setup', and a '+' icon. Below the navigation bar, the 'User Details' section is titled. Underneath, there are buttons for 'Add As Contact', 'Manage Membership', 'Reset Password', 'Edit', and 'Cancel'. A red arrow points to the 'Reset Password' button. The user's profile information is displayed in a table-like format:

First Name	edouglas	Company	Crazy Stars
Last Name	edouglas	Email Address	edouglas@e-builder.net
Username	edouglas	Account Expires	Never
Last Login	03.23.2012	Hide in Global Directory	
License Type	Contracted License		

## Personal Identification Information

Security is our utmost priority and protecting your personal information is vital. New user registration forms no longer request personal identification information, and the Personal Information tab has been removed from the user profile. Previously saved personal information has been removed from our database.



The screenshot shows the 'Personal Information' tab selected in the user profile. The tab is highlighted with a red box. The form contains the following fields:

Home Address	City
State/Province	Country
Postal/Zip Code	Home Phone
Home Fax	Personal Cell Phone
Personal Pager	

At the bottom of the form, there are buttons for 'Add As Contact', 'Manage Membership', 'Edit', and 'Cancel'.

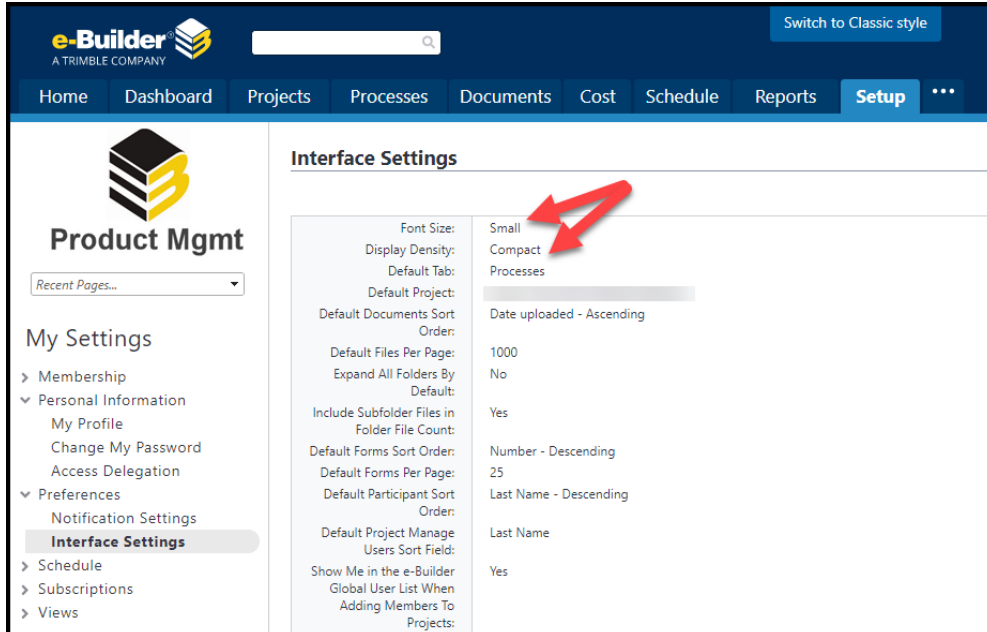
Any saved **Business Intelligence** (BI) reports that include the 9 personal information fields have been replaced with the parallel business field (i.e. Home Fax will be replaced with Office Fax.) Any saved **Standard** report that included the 9 fields no longer contains those fields. Please contact Support if you need assistance modifying reports or dashboards.

## Compass Style

### Compact Style Table Scrolling

In order to minimize vertical scrolling in long lists, the padding has been adjusted inside of table cells in Compass Style. You can adjust your font size and display density under My Settings/Preferences/Interface Settings.

The tightest Compass setting (Small and Compact) now closely matches the tightest Classic setting.



The screenshot shows the e-Builder user interface. At the top, there is a navigation bar with the e-Builder logo (A TRIMBLE COMPANY) and a search bar. The navigation menu includes Home, Dashboard, Projects, Processes, Documents, Cost, Schedule, Reports, and Setup. The 'Setup' menu is currently open, showing options like Membership, Personal Information, Preferences, and Interface Settings. The 'Interface Settings' section is expanded, showing a list of settings. A red double-headed arrow points to the 'Font Size' and 'Display Density' settings, which are both set to 'Small' and 'Compact' respectively. Other settings include Default Tab (Processes), Default Project (Recent Pages...), Default Documents Sort Order (Date uploaded - Ascending), Default Files Per Page (1000), Expand All Folders By Default (No), Include Subfolder Files in Folder File Count (Yes), Default Forms Sort Order (Number - Descending), Default Forms Per Page (25), Default Participant Sort Order (Last Name - Descending), Default Project Manage Users Sort Field (Last Name), and Show Me in the e-Builder Global User List When Adding Members To Projects (Yes).

Setting	Value
Font Size:	Small
Display Density:	Compact
Default Tab:	Processes
Default Project:	Recent Pages...
Default Documents Sort Order:	Date uploaded - Ascending
Default Files Per Page:	1000
Expand All Folders By Default:	No
Include Subfolder Files in Folder File Count:	Yes
Default Forms Sort Order:	Number - Descending
Default Forms Per Page:	25
Default Participant Sort Order:	Last Name - Descending
Default Project Manage Users Sort Field:	Last Name
Show Me in the e-Builder Global User List When Adding Members To Projects:	Yes

## 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
374058	Performance enhancements were made to refresh dashboard data more reliably.

### Bidder Portal

Case #	Resolution Notes
376858	When two users from the same bidding company are simultaneously editing the bid response, the second user to save will now receive a clear error message that their changes are not saved.

### Bidding

Case #	Resolution Notes
374795	Resolved a time zone calculation error on the Bid Portal that could cause due dates to be incorrect.

### Business Intelligence

Case #	Resolution Notes
377673	The server hardware for the government environment was reconfigured to increase the speed of BI report execution.

## Cost

Case #	Resolution Notes
330653	Importing commitments from data entry now supports the mapping of funding sources on zero amount items. We convert the zero value amounts to a split percentage distribution over the mapped funding sources.
368479	Added code to update the cost summary when deleting a commitment item in pending status.
371229	An error appeared after approving an invoice after changing the custom funding rule. If a commitment item had funding through a funding rule, but the corresponding invoice had custom funding, the cost violation was not working correctly. This issue has been resolved.
374344	Updated code to refresh the list of master commitment items whenever a process that has commitment items linked to a master commitment is saved and subsequently re-opened.
374502	Resolved an issue where the 'Include Funding' check box was no longer selected after saving the process.
375502	Resolved an issue where a commitment change item was incorrectly displaying the description of the budget item instead of the commitment item description.

## Custom Development

Case #	Resolution Notes
345199	The Contingency Utilization field was being calculated incorrectly. This issue has now been resolved.  Optimized the system performance while running Custom Reports.

## Documents

Case #	Resolution Notes
347158	Resolved an issue where redlines could not be saved in files with the "#" character in the filenames.

371312	Restored options to change DWG background colors in the Redline tool.
373989	The calibration tool for Redline was not saving changes to the tool.
375044	Optimized the query to resolve access errors.
376844	Resolved an error that caused an incorrect time stamp when using the Stamp Tool.

## Home

Case #	Resolution Notes
349552	Apostrophes and special characters in the Quick Start drop-down are now displayed correctly

## Login Issues

Case #	Resolution Notes
369689	Users belonging to multiple accounts were prompted to change their e-Builder passwords every day. To resolve this, users must delete the saved passwords for e-Builder from their browser settings in Chrome. Once they log in successfully, they can use the saved passwords feature in the Chrome browser again.
370410	Users were prompted to change their passwords each time they logged in to e-Builder. To resolve this, users must delete the saved passwords for e-Builder from their browser settings in Chrome. Once they log in successfully, they can use the saved passwords feature in the Chrome browser again.

## Navigation

Case #	Resolution Notes
370712	Fixed a sizing problem that caused buttons to sometimes jump to the next line when selected.



## Notification Engine

Case #	Resolution Notes
360715	A user received form notifications 40 days later. Resolved this error caused by the incorrect order of items in the notification queue.

## Processes/ Workflow

Case #	Resolution Notes
353104	<p>Previously, a Project Commitment Item Number that is linked to a master commitment item could be edited which sometimes resulted in duplicated master commitment item numbers. Now, the system will check for duplicate master commitment item numbers whenever a linked project commitment's status changes to 'pending' or 'approved'.</p> <p>Additionally, if the Account Level Cost Association to Project is configured to use the Project Number ID field, once a master commitment item is approved, users will no longer be allowed to edit master commitment item numbers.</p>
360499	Upgraded the Mail Merge component to its latest version to resolve an issue.
361329	Upgraded the third-party PDF library component to its latest version to resolve an issue.
365119	Resolved an issue that caused distortion of grid columns when accessed using Internet Explorer.
368035	Resolved an issue where the Due Date was not correctly reflected during the import process. If the 'Number of days for completion' setting is enabled, it will take the current time and convert it to the user's time zone and set that as the time the instance is due.
368722	View Permissions set in global custom fields will be enforced as expected.
369997	Optimized the system's performance in loading the standard view for a process.
369997	Applied query optimizations to the project processes view query.

- 372896 Modified the Process Instance Routing History to save the file name as expected instead of saving the file's internal ID.  
Existing data has not been updated. This change will be applicable only to future changes.
- 373357 Resolved an issue where a user was incorrectly receiving notifications for a process that the user was listed to not receive notifications.
- 373686 A process could not be imported due to a currency symbol in a 'decimal' custom field. The currency symbol will now be ignored allowing the import to proceed.
- 374368 Updated Import and Cost module pages to now allow dates as far back as 01/01/1900. Previously, importing or accessing cost entities with dates prior to 1980 would throw an e-Builder error.
- 374793 Deleted comments are no longer displayed in the 'Most Recent Comment' column in the Process view.
- 374835 An error appeared when previewing they layouts of a process. This has been resolved. Reason codes that are in use can no longer be deleted.
- 374881 Previously, if a Dynamic Grid field name included special characters (i.e. #, ') it caused a hard error when trying to download the Dynamic Grid template. This issue has been resolved and Dynamic Grid field names with special characters are now supported.
- 378652 Due to recent code changes, on the Process Properties page, roles with permissions to start the process and view drafts were being duplicated whenever the process was modified. Updated the code to correct this behavior.
- 379428 Fixed a typo in a SQL parameter name which affected a project process view.

## Projects

Case #	Resolution Notes
371458	Resolved an error in importing project-level field data.

## Reports

Case #	Resolution Notes
367161	Resolved an error in report formulas when comparing values from multi-pick fields.
371826	Report filters on the Process Status field returned incorrect results when using types "Contains", "Does not contain", and "Start with".
373619	The Start and Target dates for project reports was showing a difference when exported vs Print View due to incorrect time zone calculations.
373956	Optimized a report query to ensure that it runs properly.
375548	Resolved an error with reports that used custom fields in filters with multiple criteria.
375734	Custom fields containing the user's name were displaying Last, First on reports. The order has been returned to First Last, which was the previous format.

## Scheduled Task Engine

Case #	Resolution Notes
370650	Some scheduled reports were receiving an incorrect Next Run Time. The calculation has been corrected.
373679	Resolved an issue where a scheduled commitment change import failed to complete. The commitment change logging has also been fixed.

## Schedules

Case #	Resolution Notes
375751	Fixed an error that prevented the import of schedules across multiple projects in one action.
375803	The calculation of the Project Completion date was incorrect when the unit was changed from weeks to months or years.

## Submittals

Case #	Resolution Notes
372904	Some Microsoft Word documents were not converting properly to PDF. This has been resolved with a software update.

## User Setup


Case #	Resolution Notes
381711	Resolved an issue that prevented adding new users to the system either manually or by importing them.

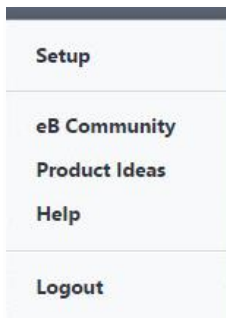
## Users

Case #	Resolution Notes
376508	Resolved an issue where a user was constantly prompted to reset their password.

## 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).