

What's New: 2009.1

Summary

User Accounts and Permissions – New permissions and copy features added to make managing user accounts easier and so you can do all account maintenance from your personal account.

Routing Recall Options – A new option was added so users with approve and change permission can recall documents. A second new option was added to work with this first option that disallows recall of cost items that are on specific other document types.

Editing Auto Report Criteria – You can now edit criteria for an auto report without having to create a whole new report and new distribution for it.

New Aggregate Custom Report – With the new aggregate report you can combine up to 10 existing custom reports into 1. This will run the included custom reports and combine them into 1 pdf output in the order you selected. Any default criteria saved with each custom report will be applied.

Rename Modules Expanded to Include 4 more Modules – This release adds Bid Solicitation, Bid Packages, Issues and RFIs to the list of modules that can be renamed. A new renaming attribute has been added for all renamable modules specifically for the name seen in the menu.

Other Miscellaneous Enhancements

User Accounts and Permissions

- Two new permissions were added – 1 for Grant Supervisor Permission and one for Division. With the addition of these 2 permissions, once the site administrator grants the “grant supervisor permission” to your personal account, you will be able to perform all activities thru that personal account, including passing this permission on to other users. Previously a normal user account could not grant any of the Site Supervisor Granted permissions forward to any other user. The only way you used to be able to grant someone access to these permissions was to be logged in as the site administrator.

Site Supervisor Granted

Client Setup	Change
Feedback Review	Change
User Account Mgt.	Change
Faxing	Initiate
Constructalk Maintenance	None
Constructalk Mapping	None
Parent-Child Administration	None
Division	None
Grant Supervisor Permission	Administrator

- You can now assign permissions to a user from another existing user account. To make 2 users have the exact same permissions, just check the Reassign rights checkbox (available on the user edit page and on the quick user setup), then select the radio button for “From User” and pick the appropriate user from the drop list. This works just like profile assignments in that the permissions are assigned at the point you hit save, but if you change 1 user, it does not automatically update the other user – it is a 1 time copy of permissions.

User Login Information

Note - login names and passwords are CASE SENSITIVE. It is usually best to use all

Login Company: esi-old (or any login alias)

Login Name: danf

Generate Random Password: ☐ (Checking this field will automatically checked.)

Passwords must be at least 6 characters long and must contain both numbers and letters.

Change Login Password:

Confirm New Password:

Ref No.:

Has Access to: All Division(s)

☒ Reassign rights

From Profile: (none)

From User: (none)

- Copying user profiles – you can now copy a profile to quickly create a similar profile. Simply select the profile you wish to copy and click “copy” and click OK on the confirmation prompt. You will get a new profile with the name set to “copy of xxx” where xxx is the profile you copied from. Adjust the name and permissions for this profile as you wish and click save.

User Profiles

User Profile List: Copy of Site Supervisor

View Save Delete Copy Auto Notify

Profile Name: Copy of Site Supervisor

Personal Organizer Project Project Documents Cost Management HR Misc. Maintenance

Personal Organizer

Personal Tasks: Change

Personal Calls: Change

Vacation (User Info): View

CW Desktop - Dashboard: None

CW Desktop - Recent Docs: Change

Routing Recall Options

There are 2 new options for recalling documents from a route. Allow non-Admin users to recall documents from this route – checking this box by itself will allow users with approve or change permission to recall a document from a route. Previously a user needed to have administrator permission. If you also check the second box, this will prevent recall of any cost items associated with the parent document from being recalled if these cost items are also on another selected document type. Users with administrator permission can still recall all cost items no matter what type of documents they are on. These 2 options provide more flexibility for the typical user to make updates and changes until cost items have been processed into documents you feel cannot be changed without administrator review.

Document Recall Settings

☒ **Allow non-Admin users to recall documents from this route**

☒ Do not allow recall of Cost Items included on this route if those Cost Items are on any of the following document types

Construction Change Directive
Contract
Contract Change Order
Invoice
Owner Change Order
Purchase Order
Purchase Order Change Order
Request For Change Order
Request For Quote

As an example, if a user with approve or change permission to cost events, has a cost event routed to them, in which cost item 002 has been processed into a contract change order, this user would see the following if they try to recall the cost event.

Action **Associated Documents** **Routing History**

Step :

Action Recall From Route

		<input checked="" type="checkbox"/>			Document Type	
		<input checked="" type="checkbox"/>			Cost Event	001:
		<input type="checkbox"/>			Cost Item	002:
		<input checked="" type="checkbox"/>			Cost Item	003:
		<input checked="" type="checkbox"/>			Cost Item	004:

This user can still recall the cost event and the other 2 cost items which are not on a Contract Change Order or Purchase Order Change Order, but has no option to recall cost item 002 which is on a Contract Change Order. A user with administrator permission to the parent document being routed can still recall any cost item.

Editing Auto Report Criteria

Users can now edit the criteria of an existing auto report without having to create a new report and set up the distribution all over. Many reports remember the criteria you entered and you can simply modify what is there. Some reports are not able to restore the old criteria, but you can still get to the criteria page and reenter all criteria.

- As seen in the auto reports log below, there is now an Edit Criteria button. Select the report you wish to update and click this button.

Reports

View Print **Edit Criteria** New Edit Void Export

Prev Next Filter [No Filter Applied] Show 20 items ☐ Show Voided

Favorites **Standard** **Project** **Multi-Project** **Auto** **Custom** **Template**

	Category	Report Name	Project
	Request For Information	Current Month's RFIs	19th Street Office Building

- You will be taken to the criteria page and for those reports that can restore the criteria, your old criteria will be prefilled. In the example below, the date range is prefilled with the old criteria and you could simply update this information to the new dates you want, then click the new Update Auto Reports button to save the changes.

View Log View Send Print Add to Favorites **Update Auto Report** Export

RFI Log

Projects

Assign New	Include?	Project	Remove
<input type="checkbox"/>	<input checked="" type="checkbox"/>	19th Street Office Building	

Filtering

CSI Code (starts with)

Date Range to

Locations No. Contains

Only RFIs processed from Contractor RFIs

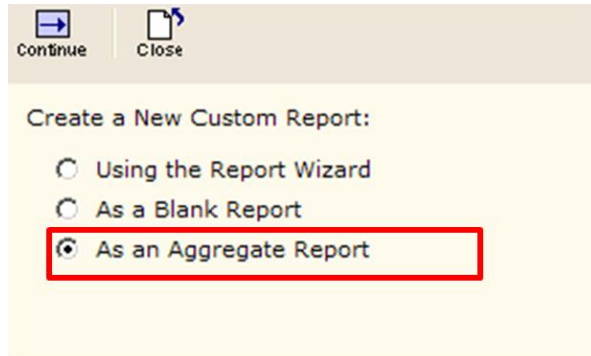
Only RFIs Processed into CEs

Other Ref. Contains

- As soon as you save any changes, the next person who runs this auto report will have this updated criteria applied to it. This new process eliminates the need to continuously create almost identical auto reports just to change some simple criteria.

Aggregate Custom Report

- A new custom report type was created to aggregate, or “bundle”, several custom reports together into 1 report. You can combine up to 10 existing custom reports into 1 aggregate report. When this aggregate report is then run, all the custom reports included in it will each individually be run with any default criteria, then be combined into 1 pdf output for the end user. As this is running up to 10 reports together, it will take as long to produce as running the 10 reports individually. The user running the aggregate report will not be prompted for any information for each individual report. They will each be run with the default sorting and criteria they were saved with.
- To create an aggregate report, you must first already have your custom reports created with any default sorting and criteria applied. Then create a new custom report and select aggregate.



Continue Close

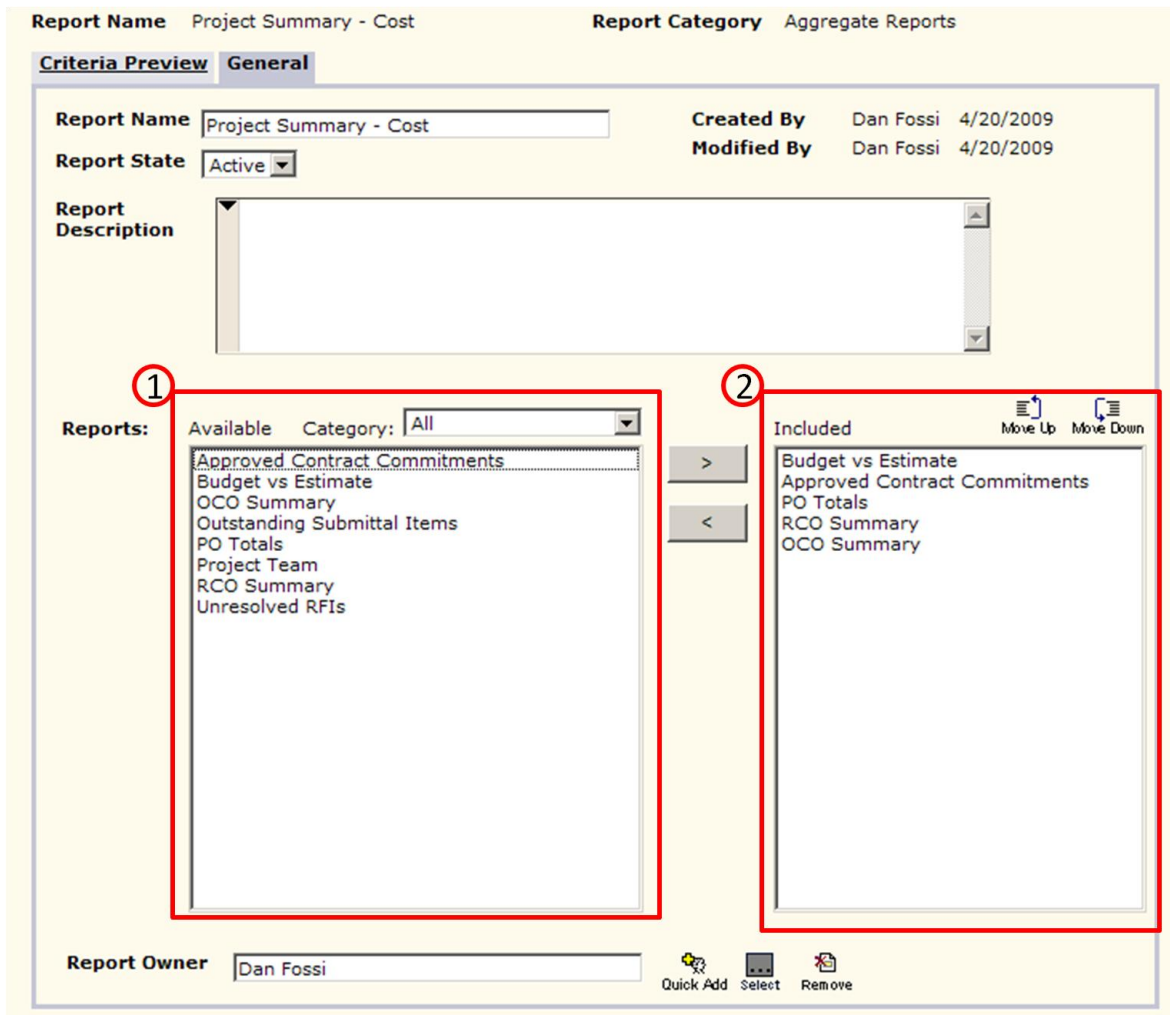
Create a New Custom Report:

☐ Using the Report Wizard

☐ As a Blank Report

☒ As an Aggregate Report

- When you click continue, you will get a page like below where you can select the custom reports to include (up to 10 max).



Report Name Project Summary - Cost Report Category Aggregate Reports

Criteria Preview General

Report Name Project Summary - Cost Created By Dan Fossi 4/20/2009

Report State Active Modified By Dan Fossi 4/20/2009

Report Description

1 Available Category: All

2 Included

Approved Contract Commitments

Budget vs Estimate

OCO Summary

Outstanding Submittal Items

PO Totals

Project Team

RCO Summary

Unresolved RFIs

Budget vs Estimate

Approved Contract Commitments

PO Totals

RCO Summary

OCO Summary


Report Owner Dan Fossi

Quick Add Select Remove

The reports listed in the available list (area 1 above) are all custom reports you have access to. If you have lots of custom reports, you can filter this list by selecting a specific category. Then select the reports you want from this list, click the right arrow button and move those reports to the included report list (area 2 above). Once you have the reports you want in the included list, you can move them up or down in the sequence and this will establish the order they are printed in the final output.

Give your aggregate report a name and save it.

When a user runs the report, if they do not have permission to all modules for which reports are included, they will not get the option to select those reports in the aggregate.

 View Log  Print

Project Summary - Cost

Reports to Run

☒ Budget vs Estimate
☒ Approved Contract Commitments
☐ PO Totals*
☒ RCO Summary
☒ OCO Summary

* You have insufficient permissions to view this report; it will not be included in the Aggregate Report

** This report has been voided and will not be included in the Aggregate Report

When the user actually views the report, first they will get the page below showing progress as each individual report is produced. The order of completion in the status does not necessarily match the order the reports will be displayed. Once each individual report is completed, then they will be compiled together into a single pdf and rendered to the user.

Processing... Please Wait	
Aggregate Report Name Project Summary - Cost	
Custom Reports Published to Aggregate Report	
Custom Reports to be added	Publish Status
Budget vs Estimate	Complete
Approved Contract Commitments	Complete
RCO Summary	Pending
OCO Summary	Pending

Additions to Module Renaming

- In a previous release, the ability to rename modules was introduced that included 9 cost management modules. This release expands the list to include Bid Solicitation, Bid Packages, Issues and RFIs. The complete list of modules that can now be renamed on a site wide basis is listed below.
 - Cost Items
 - Cost Events
 - Request for Change Order
 - Owner Change Order
 - Contracts
 - Contract Change Order
 - Purchase Orders
 - Purchase Order Change Order
 - Invoices
 - Bid Solicitation
 - Bid Packages
 - Issues
 - RFIs
- A new renaming attribute was added for all these modules for the menu name. There are now a total of 5 attributes used for renaming.

Module Cost Event Template Name Copy of Constructware Standard

General		Attributes	
Attribute	Type	Label	
		Standard	Custom
Module	Tab		
CE	Module Abbreviation	<input type="radio"/> CE	<input checked="" type="radio"/> PCO
CEs	Module Abbreviation - Plural	<input type="radio"/> CEs	<input checked="" type="radio"/> PCOs
Cost Event	Module Name	<input type="radio"/> Cost Event	<input checked="" type="radio"/> Proposed Change Order
Cost Events	Module Name - Plural	<input type="radio"/> Cost Events	<input checked="" type="radio"/> Proposed Change Order
Cost Events	Menu Label	<input type="radio"/> Cost Events	<input checked="" type="radio"/> Proposed Changes

- You can set up alternate module names in Module Customization. Navigate to Module Customization, select the module you want to rename and click **Edit**. On the **Labels** tab, select the template that is currently "In Use" and click **Copy**. **Edit** the new template, verify that the **State** is Active, enter a new name and number, select the **In Use** checkbox, and click **OK**.

On the **Attributes** tab, edit the attributes shown above to meet your business process names.

The Standard Label column contains the default module names. The Custom Label column is where you can enter your custom names.

If you later decide that you want to use the original default name, return to the Attributes tab in Module Customization and select the radio button for the attributes in the Standard column.

Alternate names do *not* appear in the following locations in the application:

- Blackberry
- Report categories – The drop-down list of categories for standard or custom reports.
- Online help
- Sample templates
- Bookmarks
- Data Exchange samples, XML, and public field names
- Doc select pop-up filters
- Any attribute name that contains a module name will not be affected by renaming a module. If you want to

rename an attribute, you can do that independently of changing the module name. For example: "Contract For" is an attribute of the Contracts module. Changing the name of the module from

Contracts to something else would not affect the "Contract For" attribute.

Note: The alternate names you define will be specific to your site only and will apply to every user on your site.

Other Miscellaneous Enhancements

We have also made the following miscellaneous enhancements:

- **Cost Management Bonds** – In the Bonds module under cost management, we have added a number field (Bond No). This is a text field the user can enter whatever number they want. This No field and the approved date were also added to the Bonds log and the No field was also added to the Bonds report.
- **Multi file upload for Client Contracts, Client Bonds and Client Insurance** - Users can now upload multiple files to these 3 modules. In order to keep these files private to the people with permission to these modules, they are not added to the documents folder like some uploaded files, but are instead only linked thru the module they are uploaded from. If you upload just 1 file, a link will be displayed on the log where you can quickly view the file. If you upload more than 1 file, a link saying "multiple" will be on the log. Clicking this "multiple" link will bring you to an intermediate page where you can select which of the files you want to view.
- **Masking and Labeling added to Bid Packages** - In Module Customization, you can now enable masking & labeling for the attributes on Bid Packages. This, in conjunction with the newly added module renaming, will allow a site administrator to completely control the names/labels displayed in this module to meet their terminology. Like other modules that have masking & labeling, it is enabled and controlled at the site level only and requires administrator permission to the module to set it up.
- **International Faxing** - Users can now fax to non US fax numbers. When entering a fax number it should be entered with a plus (+) sign and the exact number you would fax to if you were sending it from the US (some countries will drop certain digits when faxed from the US vs. if it was faxed from somewhere outside the US). Fax numbers without a plus (+) sign will be treated as a US number and leading 1 will be added if only a 10 digit number was entered.

Example: For the UK fax number 1253476805. When dialed locally from the UK would be 01253476805, but for international dialing from the US this would have to be entered as +44 1252456601.