

## V4.0

## 100 - Application -System Administration &amp; Setup

## 1-Feature

## 4793 Enhanced Network Error Management

Released

The system will detect and verify if the network connection is having problems.

## 2-Defect

## 4254 The default construction codes for CSI 95 are missing several division level codes

Released

The system installed csi 95 construction codes are missing a number of division level codes. The following codes need to be added:

- 25 Add 02000 - Site Construction
- 81 Add 05000 - Metals
- 108 Add 06000 - Wood & Plastic
- 110 Add 07000 - Thermal and Moisture Protection
- 130 Add 08000 - Doors & Windows
- 153 Add 09000 - Finishes
- 181 Add 10000 - Specialties
- 250 Add 12000 - Furnishings
- 263 Add 13000 - Special Construction
- 293 Add 14000 - Conveying Systems

## 101 - Contact Management

## 1-Feature

## 4955 Contact location displayed as search or Grid attribute

Released

The system will allow a user to select the contacts location as a searchable and display grid attribute

## 4961 System Default for Contact Organizational Linking

Released

The system allows the system administrator to define a system default that will enable or disable the contact organizational matching routine that attempts to locate an existing organization when a user enters a contact with a similar organizational address, fax, etc.

## 4766 Unverified Contact Email Editing

Released

The system will allow a user to edit the email of contact that has not verified. If the new email being assigned exists in the local system, the user will get an error message and be unable to assign the email to this users. If the new email being assigned exists on the global server, the user will be notified that they should terminate the process and create a new user so that the system can properly execute the create new user from global server function.

If the contact being assigned the new email has already been sent a notification, the user will be warned that changing the email will invalidate the notification previously sent.

## 4801 Contact in the Organizational Default as Grid Column

Released

The system allows the user to select the default contact value as a display result in a contact search.

## 4802 Contact verification status value as contact search result and grid column

Released

The system allows the user to select the Verification Status value as a display result in a contact search. The value will display the Gear logo for those users who have completed the verification process.

## 4812 Organization Default Contact Selectable as Search Criteria and Search Display Column

Released

The system allows the user to select the default contact value as a display result in a contact search.

## 2-Defect

## 4411 Organizational Search Screen Doesn't show Default Organizational Contact

Released

<div>

When a user searches for an organization while editing a contact, the system does not display the default organizational contact in the search result "Contact" Column.</div>

## 102 - Document Distribution

## 1-Feature

## 5125 Smart Folders Do Not Display In Sub Theme

Released

Users clicking on smart folders see no results even though documents are displayed in the windows application.

## 5040 File Transfer to IPAD Mobile Applications via S3

Released

The mobile application can transfer files from S3 to update the local database.

5039	<b>File Transfer to Windows Mobile Applications via S3</b>	Released
	The mobile application can transfer files from S3 to update the local database.	
5108	<b>Prolog Project Reset</b>	Released
	The system allows a system administrator to select a project and clear all of the prolog header ID's so that the synchronization can be rerun.	
5115	<b>Sub Portal Usability Enhancements</b>	Released
	The sub portal has been enhanced to improve the user experience and improve reliability.	
5095	<b>Web Portal Subfolder Download</b>	Released
	The system web portal will allow a user to select an option to download all subfolders and subfolder contents from a project.	
Defect		
4335	<b>Improve Remote Order Management</b>	Released
	ROM has been improved, specifically with remote call failures and performance allowing orders to be able to be accepted and processed reliably.	

## 103 - Document Management

### 1-Feature

5094	<b>Document View Creation</b>	Released
	The system allows a user to create a new document view that will be available for selection on any document grid. The creation screen will allow the user to define the fields as well as default attributes for the view.	
5116	<b>Document View Display</b>	Released
	The system populates the project document grid with the information defined by the selected view.	
5092	<b>Document View Management</b>	Released
	The system allows the user to View, Edit and delete previously created document views which they have permission to access/edit.	
4772	<b>Drawings Revised by Sketches display in Issue Drawing Tab</b>	Released
	When a sketch is added to an issue, the system will generate a drawing that is placed on the drawings tab that represents the new version of the drawing with the incorporated sketch. This allows the QC team to review and modify the combined sketch prior to release.	
4848	<b>Enhanced Format Editing</b>	Released
	The system allows an authorized user to replace the Viewable, Printable, and Electronic format of a document with an updated file. The system allows the user to select a file from their hard drive and upload the file as the new formats. The old formats will be remain attached to the document to maintain history .	
4779	<b>Enhanced Remote File Viewing</b>	Released
	The system allows users to view documents from remote links that can be embedded in viewable documents, or third party application. When the user clicks on the link the system will ask them to enter authentication information and then deposit a cookie on the machine that will allow the to continue viewing documents until they log off from the system.	
4962	<b>Export OnCenter OSX File to disk</b>	Released
	The system allows a user to extract an OSX file to the disk instead of launching the on center application.	
4999	<b>Import Server emails warnings when queue length is too high</b>	Released
	Import Server emails warnings when queue length is too high	
4862	<b>Issue Builder Document Delete Protection</b>	Released
	When a user deletes a sketch or Document Version from Issue builder, the system will automatically remove other documents related to the sketch or drawing so that the user cannot import a malformed document.	
4866	<b>Issue builder file viewer enhancements</b>	Released
	The viewer used from issue builder will be enhanced with the following function: 1) PDF files will be converted to TIF for viewing even when more that 1 page 2) An open button will be added that will launch in the associated windows application 3) PDFTron will be used to convert the PDF to TIF so we don't get "all white" or "all black" pages 4) Closing the viewer (or saving the issue) while a batch conversion is in progress must shut down properly (with showing Ignore, Retry, Fail to the user)	
4884	<b>Issue Builder Item Number Character Filtering</b>	Released
	The system filters the characters that can be entered into the Item Number field in the Issue Builder application. The system will perform the following Item Number processing when text is entered: Remove any Spaces or other ASCII non-displaying characters, convert dashes to hyphens, remove any ascii control characters (Line Feed) and convert all text to upper case.	
5110	<b>Mobile Content Generation Service</b>	Released
	The system provides a service that will process scheduled and requested mobile data updates from an instance to the Cloud Mobile Server. Client Mobile devices can then access the data and copy it to local device storage.	
4782	<b>Monthly Hosting Storage and Transfer billing report</b>	Released
	The system will create and update a hosting transaction table that can be used to generate a monthly report showing the peak monthly storage and total monthly transfer volume. This table will be used as the datasource for the monthly hosting reports.	

4759	<b>Prolog Drawing Discipline Synchronization</b>	Released
	The system will publish drawings with the appropriate discipline value into the Prolog Manager system	
4758	<b>Prolog Drawing Revision Synchronization</b>	Released
	The system will publish revised drawings to the Prolog Drawings and Specifications log.	
4757	<b>Prolog RFI Related Collaboration Documents from Prolog Converge</b>	Released
	The system allows a prolog user to associate sketches and other collaboration documents to a Prolog RFI via the Prolog Converge application and the system will synchronize the collaboration documents so they are linked to the RFI document created in the system.	
4756	<b>Prolog RFI Related Collaboration Documents from Prolog Manager</b>	Released
	The system allows a prolog user to associate sketches and other collaboration documents to a Prolog RFI via the Prolog Manager application and the system will synchronize the collaboration documents so they are linked to the RFI document created in the system.	
5135	<b>Smart Folder Restructure</b>	Released
	The system allows a user to resturcture a smart folder to become the child of a second smart folder. Currently, smart folders cannot be added as a child of an existing smart folder.	
5000	<b>Subproject Aware Sketch Processing</b>	Released
	The system will allow a user entering a sketch via Issue Builder to enter the sub-project name so that the sketch can be applied to the drawing in the designated sub-project.	
5166	<b>Issue History Report</b>	Released
	The system allows a project administrator to generate a report that shows all released and pending issues that contain documents along with information about which documents are revisions or new additions to the project.	
3413	<b>Folder Structure Move</b>	Released
	The system allows a project administrator to select a folder and initiate a Folder Restructure. The action will display a modal dialog asking the user to select a folder and then drag and drop the folder and any child folders will be moved to folder selected.	
4795	<b>Allow issue documents to be download in bulk from SubTheme</b>	Released
	Currently the issue documents only have a Download button in each row of the grid. This would require someone to click on each row.	
4864	<b>Folder Reorganization - Move Folder Tree</b>	Released
	The system allows a user to select a folder and then invoke the "Restructure Folder" action. The system will allow the user to select a new parent folder and then move the selected folder to the new parent.	
4770	<b>Prevent Sketch and Sheet from Simultaneous Release</b>	Released
	A sketch cannot be released in a issue that also releases any revision to the drawing associated to the sketch.	
4762	<b>RFI Sketch New Revision Field Auto Increment Default</b>	Released
	When a sketch is added to a document Issue, the system will automatically increment the column named "New Revision" with an incremental value of the current revision to add the next alpha character. For example "00" would become "00A" and "01A" would become "01B". The system would allow the user to modify this value to any value that is not a duplicate of the drawing revision value. If the user enters a duplicate value the row will turn to red and display an error message. The user can use either the grid or the right click "Choose Drawing for Sketch" action to update the column value.	
2697	<b>Automatic Document Name Retrieval</b>	Released
	When a document is added to Issue Build that has a previous revision, the system will automatically pull the document name from the previous version if the name is not included in the parsed information from the filename.	
4860	<b>Enhanced drag/drop processing</b>	Released
	When multiple folders get dragged/dropped into the system, the system will keep the user informed of progress and won't let them close the project until it is safe to do so.	
4789	<b>Implement remote unarchive</b>	Released
	Implement remote unarchive core (vault) and client changes required	
4859	<b>Issue document viewer enhancements</b>	Released
	The system allows the user to launch the original file in the associated application. the system also allows for quick pdf viewing of spec books by converting the first page to a TIF.	
5049	<b>Multi Document edit needs to prefetch files and improve viewing speed</b>	Released
	Multi Document edit needs to prefetch files and improve viewing speed - add way to prefect file downloads to the user does not have to wait between rows - improve viewing speed by converting the files in the background once the files are prefetched	
4765	<b>Multiple project Archive or Purging</b>	Released
	The system allows the system administrator to select one or more projects and invoke the archive action. The system will then allow the user to define a local or remote file share which will inform the system where a copy of the project documents will be copied as they are removed from the project. The user can also select an option to Purge the files which will erase the documents from the vault without creating the local backup copy. Multiple warnings will be given to the user to assure that they know that once the documents are purged that they cannot be recovered.	
5001	<b>Transaction Log Entries for Removing Items from Folders</b>	Released
	The system will create an entry in the transaction log when a document is removed from a folder	

5093	<b>Document View Selection</b>	Released
	The system displays the currently selected document view name above the grid, and allows the user to quickly select from other available document views defined.	
5098	<b>Expanded Issue Description Field</b>	Released
	The system supports a greatly expanded document issue description field. The user can now enter up to 2,048 characters into the description field.	
5134	<b>Root Smart Folder Mirrors</b>	Released
	The system allows a user to select a smart folder when creating a mirror on a bid package	
4783	<b>Issue Document Paste</b>	Released
	The system allows users to copy any number of files via the windows copy command and paste them into any of the Issue Builder tabs using the Ctrl-V or right-click Paste commands. This allows for easier operations when editing issues on a laptop or tablet with limited resolution to facilitate drag and drop.	
Defect		
4418	<b>Manage Versions dialog sets SourceltemID incorrectly, and UI needs to be made more clear and improved</b>	Released
	Manage Versions dialog sets SourceltemID incorrectly. It is currently being set on the most recent chain item, not the first. The UI also needs to be easier to understand that chains are being updated. Add Issue fields into UI. More rigorous broken chain detection also needs to be added. Also add SourceltemID & Document Type ID for advanced diagnostics of broken document chains.	
4419	<b>Multi-Document Edit needs a fast mode that does not check for broken chains on unchanged documents</b>	Released
	Multi-Document Edit needs a fast mode that does not check for broken chains on unchanged documents Add 'Advanced Dup Check' checkbox that will tell the application to look for broken chains for documents that have not been modified by the user.	
4427	<b>Multi-Document Edit needs to use new file viewer</b>	Released
	Change viewing over to the new viewer being used by file upload.	
4371	<b>Portal View of an Issue Does Not Show Issue Document</b>	Released
	When a user views a document issue from the web, the system does not show the Issue Document (Narrative).	
4347	<b>Automatic Revision Increment for Sketches does not add an alpha character.</b>	Released
	When a sketch is added to a drawing, the system is incrementing the revision number automatically if the user does not add a "Next Drawing Revision" value. However, it should add an Alphabetic character to numeric values not increment the numeric value. For example "00" should become "00A" not "01" and "00A" should become "00B".	
4345	<b>Corrupt Zip File in import server causes client upload to fail.</b>	Released
	The system will stop uploading documents to the server if a corrupt zip file is created on the server. The file will be be automatically deleted before file uploading will continue.	
4321	<b>Duplicate Drawing Import Via Issue Builder</b>	Released
	Adding Two Drawings with the same drawing number but different revisions to an Issue causes two drawings to be created that violate the duplicate key. This prevents any further attachment of sketches or revisions to that document and cannot be fixed.	
4369	<b>Document Details page in SubTheme does not display if the document is current or not current</b>	Released
	The document details window should display some visual that the document the user is viewing is either the current version or out dated and no longer current.	
4422	<b>Drag Drop between projects into mirrored folder display exception</b>	Released
	Drag Drop between projects into mirrored folder display exception	
4373	<b>Issue Items are missing the hyperlink to browse to the document details page</b>	Released
	In folder items you are able to click the item name and browse to the document details page, but the issue documents do not have the same link.	
4358	<b>Multiple remote archive and purge encounters vault error</b>	Released
	A vault error was occurring when performing a mulitple remote archive/ Multiple remote archives are now working correctly.	
4385	<b>Issue Builder Copy Down will now show hour glass when processing.</b>	Released
	When adding the subproject or any other duplicate key field to issue builder via copy down, the system was processing but not alerting the user. The processing for copy down takes some time to complete. Without an indication to the user that the system was completing the task was causing confusion . The system will show an hour glass when processing during a copy down to let the user know that this process must complete before additional work can be done.	

## 104 - End User Features

2-Defect		
4362	<b>Providing a direct link to the login page leaves the users stuck on the login page after they login</b>	Released
	Currently all web apps need to be directed through the default.aspx page to gather the correct redirect URL. If you go directly to the login page the web app does not know where to redirect the user after they login.	

## 105 - Communications Management

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### 2-Defect

- 4428 **Subject Line in Notification Preview not refreshing when selecting new notification from drop down list.** Released  
 Subject Line in Notification Preview not refreshing when selecting new notification from drop down list. This seems to have broken in the 3.5 release series. Verified in HD Supply demo site and Skanska's inSite system.
- 4364 **Notification Field Sorting Order was not displaying the notification attributes in sorted order.** Released  
 The system did not display the notification attributes in any sorted order. This was making it hard to find specific attributes on notifications with large numbers of attributes. The system will now use the display order set up by the system administrator for a notification..
- 4394 **Update 3.4 notification service to send Secure Faxes** Released  
 3.4 notification services need to be able to send secure faxes, as 3.5 not does.  
 This will allow Amazon faxes to send properly.

## 107 - Portal Administration

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### 2-Defect

- 3410 **Cannot download a Build Set in the Web SubTheme** Released  
 From the FileDownload\_Single page it does not check for sets. It only checks permissions and statuses

## 108 - Project Management

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### 1-Feature

- 4730 **Project Notes display on the web portal project details page** Released  
 The system will display the project notes on the web portal so that users may review the information.
- 4169 **Project Number Display in Project Grid** Released  
 The system displays the project number as the first column in the system project grid.

### 2-Defect

- 4341 **Required Project Attributes Disable Template Creation** Released  
 When a project attribute is defined as required, the system cannot create a project template due to the fact that the template creation wizard does not allow inputting the required attributes. The system will now allow you to no longer hide required attributes and Better validate message on project create and project edit when required attributes are missing (used to be un-handled exception form)
- 4334 **Prolog Synch is reporting large numbers of errors due to missing values** Released  
 The Prolog sync application had reported missing disciplines in the error log. With large file imports this can cause the error log to become saturated with what are essentially warnings. The sync app has been updated to only log missing attribute messages as a warning. The system will not log missing discipline messages in the error log.

## 109 - Reporting

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### 1-Feature

- 5127 **Enhanced Web Item Billing Organization User Access Report** Released  
 The Web Item Billing Organization User Access Report will now group by organization and then contact instead of just by contact. The report also displays every document accessed and then totals the amount of storage downloaded by project, organization and user.
- 5126 **Notification Recipient History Report** Released  
 A report that shows the notifications that each organization user received along with the date and time. This report allows users to audit what information was communicated to each recipient.
- 5123 **Rebranded DocuPro Document Contract Operations Guide** Released  
 The Submittal Operations Guide will be updated with DocuPro Branding
- 5124 **Rebranded DocuPro Document Contract Operations Training Presentation** Released  
 The Submittal Operations Training Presentation will be updated with DocuPro Branding
- 5120 **Rebranded DocuPro Notification Customization Guide** Released  
 The Notification Customization Guide will be updated with DocuPro Branding
- 5119 **Rebranded DocuPro Reports Customization Guide** Released  
 The Report Customization Guide will be updated with DocuPro Branding
- 5121 **Rebranded DocuPro Submittal Guide** Released  
 The Submittal Operations Guide will be updated with DocuPro Branding

**5122 Rebranded DocuPro User Guide**

Released

The Submittal Operations Guide will be updated with DocuPro Branding

**5128 Rebranded DocuPro Reports**

Released

All reports have been rebranded with the new DocuPro Branding

**110 - Core Functionality and API**

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**2-Defect****4367 ROM and Index are creating too many log entries for successful completion of tasks making it difficult to loc**

Released

ROM and Index are creating too many log entries.. ROM and Index will no longer create log entries for successful logins, not log invalid login attempts. The system will report authentication/verification issues to user. Lastly, work was completed that reviewed all connection creations to make sure logging is being done efficiently.

**111 - System Administration**

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**1-Feature****4784 Vault Audit Report**

Released

The system allows the system administrator to run a report that will list any documents that do not have the appropriate file located in the vault position identified by the System.

**112 - Security Management**

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**1-Feature****4792 Role Change Tracking**

Released

When a user is selecting different roles on the project Security tab, the system will determine if the user has made any permission changes so that it does not have to write all permissions unless a change has been made. This will dramatically improve the performance when view role permissions without making changes.

**4997 Project Administrators can edit role members**

Released

The system can be configured to allow Project Administrators to edit role members.

**114 - Bid Management**

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**1-Feature****4259 Multi-Invitee comments**

Released

The system allows a authorized user to select multiple invitees from a bid list and enter a Comment that will be applied to all of the invitees.

**3612 Bid Package Folder Copy - Issue Folders**

Released

The system will allow a user to copy issue folders to a bid package.

**3927 Bid Package Folder Copy - Project Folders**

Released

The system allows a privileged user to copy a project document folder and all subfolders from a project to a bid package. When the folders are copied, all bid package contacts will be granted access permission to all of the copied folders in the Bid Package.

**2-Defect****4396 Create Bid Package should give edit permission to all the other project admins**

Released

Create Bid Package should give edit permission to all the other project admins

**116 - Application Integration**

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**1-Feature****4998 Contents of Smart Folders appear in takeoff tools**

Released

Contents of Smart Folders appear in takeoff tools

**118 - General User Interface Functionality**

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**1-Feature****4861 Enhance Login Page's Visual Feedback**

Released

Users are struggling to see the Forgot Password button and the textbox to lead them to the FP page. Add some bolder visual feedback to make it easier for users to see during login struggles.

## 5024 UI updates for Manage Versions dialog

Released

Add Sub Project to grid UI for both document chains.  
Update some labels on the dialog ui.

**121 - Submittal Management**

## 1-Feature

## 4982 Submittal Open Review Summary - BIC Report

Released

The system will provide a report that shows all open submittal items that are awaiting review along with their status for each BIC Contact on a project.

## 4983 Submittal Open Review Summary - Reviewer Report

Released

The system will provide a report that shows all open submittal items that are awaiting review along with their status for each Reviewer Contact on a project.

## 4984 Submittal Return Time Detail Report

Released

The system will provide a report that shows the amount of time that each reviewer has required to return submittal items by week.

## 3596 Move Submittal Tree Branch

Released

The system allows a privileged user to move a submittal tree branch from one location to another in the submittal tree.

## 3597 Move Submittal Tree Branch that Contains Child Submittal Group Folders

Released

The system allows a privileged user to move a submittal group folder branch that contains child submittal group folder(s) from one location to another

## 4137 Enhanced Submittal Restructuring

Released

The system allows a user to see the Submittal Section number, Paragraph number and description when restructuring submittal items.

## 5085 Project Submittal Coverage Note

Released

The system will allow a user to enter a custom HTML note on the project that will be displayed on all submittal coverpages.

## 4979 Submittal Return Status Detail Chart Report

Released

The system provides a report that will display a submittal status pie chart that shows how many submittal items were returned Early/Late/Ontime for each reviewer that has a submittal assigned to them for review for each project.

## 4978 Submittal Return Status Summary Chart Report

Released

The system provides a report that will display a submittal status pie chart that shows how many submittal items were returned Early/Late/Ontime for the project.

## 4981 Submittal Submission Status Summary Chart Report

Released

The system provides a report that will display a submittal status pie chart that shows how many submittal items were submitted Early/Late/Ontime for the project.

## 4980 Submittal Submitted Status Detail Chart Report

Released

The system provides a report that will display a submittal status pie chart that shows how many submittal items were submitted Early/Late/Ontime for each reviewer that has a submittal assigned to them for submission for each project.

## 5109 Submittal Permission Management Improvements

Released

The system automatically resets the permissions for submittal Lead submitters or reviewers when the Manage Permissions function is selected by a project administrator from the submittal grid.

## 5100 Set Submittal Permissions Grid Action

Released

The system allows a project administrator to set a submittal item's permissions by right clicking on a submittal item in the grid and selecting "Set Submittal Permissions".

## 2-Defect

## 4151 Unable to drag and drop a contact to Observers on submittal Contacts tab

Released

The system does not allow a user to drag and drop a contact to an Observers on the submittal Contacts tab.

**122 - Contractor Prequalification**

## 1-Feature

## 4769 Add the ability to edit global entity record information from Prequal.

Released

Currently the global record info is read-only and to keep from duplicating pages it's best to redirect back to Host, let them edit their information, then direct them back to Prequal.

This will be a joint effort with M.Doll.

## 4720 Designation of organization prequalification contacts

Released

The system allows a user to edit one or more contacts and designate that they are the appropriate contacts within an organization to receive Requests To Prequalify Notifications and have permission to add or edit prequalification data.

## 4800 Contact Status display in search results and contact display grids

Released

The system allows a user to select the contact status field for display in the search result and address book display grids.

4805 **Organizational Information Editing by Prequalification Contact**

Released

The system allows any user that is enabled to edit the prequalification to edit the company name, address, phone numbers, construction codes, service areas via the basic and full prequalification forms.

2-Defect

3342 **Prevent users from being able to update a prequal if it is locked.**

Released

The system prevents a user from making any changes to a prequal record when it is locked by a reviewer. The system displays a message on the prequal indicating that the record is locked.



