



Eos Cortex Project History 1.8

Readme File

This document provides late-breaking information about Cortex Project History 1.8.

Contents

New features and enhancements	2
Known issues and fixes.....	4

New features and enhancements

This release of Cortex Project History includes the following new features and enhancements:

- **Save project portfolios as dynamic portfolios**

When you use browse or search to open a project collection, filter the collection (optional), and select all the resulting projects, you can save the collection as a *dynamic* portfolio. Dynamic portfolios remember the browse, search, and filter criteria used to create them and can reapply that criteria when you open the portfolio later. As you import new projects that meet the dynamic portfolio's criteria, Cortex automatically includes them in the portfolio.
- **Configure multiple summary notes on the project attributes page**

Previously, the only system field configured to display across the top of the project attribute page was the **Project summary** system field. Now, two new groups, **Project notes – header** and **Project notes – footer**, are available in **Administration > Fields**. Fields included in these groups display across the top or bottom of the project attributes page, respectively.

Note that in addition to being included in the groups, the administrator must also configure fields to display on the project attributes page under **Views > Project page > Attributes** in **Administration**.
- **Display project-specific attribute comments**

The import template includes a new comment field for each project attribute value. For example, suppose you have a **Site conditions** field and for a particular project the field value is **Difficult**. Now you can enter a comment explaining why the conditions were difficult. Clicking ⓘ next to the value displays the comment for the value. Cortex also includes attribute comments as cell comments in Microsoft Excel output.
- **Chart enhancements**

This release includes the following enhancements to charts:

 - **Named and saved pie chart views**

The project information pane displays in the project collection, as well as in single project view. Prior to this release, administrators could configure only a single set of cost categories to drive the pie chart.

Now administrators can define multiple views with different cost combinations. For example, you could create a view named **Summary** that divides the pie chart between labor and non-labor, and then have a **Detail** view that shows Labor, Material, Subcontract, Equipment, and Markups in the pie chart. Users can select the desired pie chart view from a list in the project information pane
 - **Select all option when selecting values to chart**

When you want to quickly select all the available values for charting, you can click the select all checkbox at the top of the list of values.
 - **Persist element view selection when charting element costs**

Now when you switch between element grid views and element chart views, your element view selection persists. For example, if you select a UniFormat view for a grid, when you go to charts, the same UniFormat view is automatically selected.

- **Export enhancements**

This release provides the following export enhancements:

- **Enhanced single project export to Excel**
The output of the single project export to Excel now looks more like what you see in Cortex. The **Attributes** sheet includes the project information pane, which displays the project thumbnail image and the pie chart. The **KPI** and **Element** sheets provide the ability to expand and collapse groups and include frozen header rows and frozen description columns.
- **Export “flat” project data for external reporting and analysis tools**
The new flat data export feature allows you to take a collection of projects, select an element view (such as UniFormat or MasterFormat), and quickly download an Excel file that is ready for use with reporting and analysis tools such as Microsoft’s Power BI.

- **Administration enhancements**

Administration enhancements in this release include:

- **Save & add when creating new fields**
Previously you had to save fields one at a time when creating fields. Now you can click **Save & add** when you want to quickly add multiple fields.
- **Quickly find fields when managing long field lists**
Prior to this release, managing long field lists meant scrolling to find the name of the field you wanted. Now you can filter the field’s **Name** column and enter a key word to filter the list. For example, if you enter **concrete** for a *contains* search, the list displays any field with **concrete** in the name, such as **Concrete quantity**, **Concrete hours**, and **Concrete cost**.
- **View directory group on Edit User record**
When using Windows Authentication, you can now see the Active Directory group in the **Edit User** window within **Administration > Users**. This is useful when you want to confirm which permissions users have based on their Active Directory group.
- **View the last time a user signed on**
Administration > Users has a new column that displays the last date and time a user signed into the system.
- **Set compare project limit in Administration**
A new setting in **Views > Compare > Project limit** is available for setting the maximum number of projects that can be included in a project comparison. Companies with very large projects may want to set a lower limit to avoid users experiencing excessive wait times.
- **Auto-scroll when sorting list values**
Previously when dragging list values to sort them, you could only drag the value within the visible window (i.e., the window would not scroll). Now when you drag a value to the top or bottom of the window, the window automatically scrolls.
- **Expressions for text type fields**
You can now drive a text field with an expression. Expressions can be used to concatenate values from other fields or populate fields based on the values of other fields.
- **Unit expressions for quantity type fields**
Now when you create an expression for a quantity type field, you can also use an expression to drive the unit value for the quantity. This can be useful if you have different lookup element quantities for a given cost group in an element hierarchy based on things like project type.

- **KPI values now included in Confidential mode**
In 1.8, when you mark a field used in a KPI view as confidential, it will be hidden while in Confidential mode in both the application and the Excel output.
- **Default field values and other new field settings**
You can now set default values when managing fields. For example, if most of your projects are in the USA and you have a project field for **Country**, you can set **USA** as the default for that field. Import templates pre-populate with defined default values so that content managers do not have to fill them out unless they need to change the default value.

Other new settings include specifying whether a field should be available in charts, and the default column width when the field is used in a grid.

Known issues and fixes

This release of Cortex Project History has the following known issues and fixes:

- **Browse projects order**
When browsing projects, the classification values were sorting list field values alphabetically instead of the order configured by the administrator. This issue has been fixed.
- **Import template item sheet cell formatting**
Previously if you downloaded a blank import template, only the top row of the **Item** sheet was formatted based on the field types. Now the first 2,000 rows are formatted.
- **Error when exporting KPI views to Excel**
In previous versions of Cortex, if a KPI view name contained certain special characters not allowed in Excel or it exceeded the maximum sheet name length, Cortex would report an error. Now the system automatically removes special characters and truncates the sheet name to meet Excel's requirements.
- **Erroneous blank values in the Group column filter**
In **Administration > Fields > Project fields**, when you opened the column filter for the **Group** column, the list displayed a **<blank>** filter choice even when all fields were assigned to a group. This issue has been fixed.
- **Manage import templates not honoring field group order**
Previously when the configured group order for project or item field groups changed, the **Manage import templates** field lists did not update to reflect the new order. This issue has been fixed.
- **Currency code columns on item sheet in the import template**
In previous versions, the system would include currency code columns for every currency column on the item sheet in the import template whether or not the Currency Conversion system was turned on. Now these currency code columns will only be included when Currency Conversions are used.