



Eos Cortex Project History 1.13

Readme File

This document provides late-breaking information about Cortex Project History 1.13.

Contents

New features and enhancements	2
Known issues and fixes.....	3

New features and enhancements

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

- **Enter element quantities and project specific element notes**
Previously, element quantities came from a project quantity field (Lookup quantity) or from adding up the quantities of child records based on a specified unit. In addition, you could not include a note about the element for the project. Now when editing a project, you can enter quantities and project-specific element notes for any element in any element view.

Entered quantities are useful if you manage element quantities on an ad-hoc basis or have the occasional override. Element notes are helpful for recording anything special about an element that caused the costs or quantities to be unusual for that particular project.

- **Item library code descriptions in project import templates**
To make coding items easier, the lists for item library field columns on the **Items** sheet now include the code description along with the code. For example, when selecting a value for Unifomat II, the list displays **A10 | Foundations** instead of just showing the code (**A10**).
- **Filter elements and items by selected projects when browsing**
Now you can limit a list of elements or items to those belonging to a certain project or group of projects by navigating to a project collection and selecting the projects you want to filter on.

When one or more projects are selected, an asterisk appears next to the **Elements** button at the top of the page indicating that Cortex will filter the browse groups by the selected projects. When you open the browse elements page, the counts reflect the number of records belonging to the selected projects. When you click a group, the resulting collection honors the project filters. This feature is useful when you are looking for an element or item that is special based on the type of project it was used in.

- **Use text and list type fields in element view hierarchies**
Previously, you could use only item library type fields when configuring element view hierarchies. In this release you can also use text and single-select list fields. Text fields are useful for views where the grouping values vary from project to project. For example, suppose you want to group costs by an owner's list of bid items. Text fields allow you to enter any value so you can code to each project owner's specific list.
- **Filter pane enhancements**
The filter pane in all collections now displays larger numbers in range value filters.
- **Send portfolio enhancements**
When saving a portfolio, you can now click **Save & send** to open the **Send Portfolio** window directly. In the **Send Portfolio** window, you can search for recipients, multi-select them, and enter an additional note to include in the notification they receive. The layout and format of the email notifications has also been improved with a new look and feel for this release.
- **Display factors as attributes**
Previously, you had to open the **Apply Factors** window to review applied factors and associated multipliers. Now each factor is available as an attribute that you can add to the project page (**Attributes**) and the **Project Comparison** page (**Attributes**).
- **Performance enhancements**
Various pages have been optimized for speed. Examples include navigating between views on the **Project Comparison** page and expanding and exploring element hierarchies.

- **Chart enhancements**

Chart enhancements in this release include:

- **Hide plots on scatter charts**

Previously, you could remove records from scatter charts, but could not simply hide them. Now all records are listed in the legend and you can click individual records to hide them from the chart.

- **New crosshair hover tips on scatter charts**

Now when you hover over a scatter chart, the system displays crosshair lines with tips that display the x and y axis values. For example, if you hover on the trend line at a known value (e.g., the expected project size of a proposed project) the crosshair hover tip can display the likely corresponding total cost based on the trend of the charted records.

- **Order legend in Project Information Pane pie chart**

In addition to sorting the cost group descriptions in the pie chart legend from highest to lowest cost, you can now sort based on the configured order for the view in Administration.

- **Show/hide chart legends**

Previously, if you tried to chart more than a certain number of records, the legend could cause display issues with the chart. Now you can hide the legend for a better view of the chart.

Known issues and fixes

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

- **Grid auto-scrolling when configuring KPI views in Admin**

After performing various workflow steps while configuring KPI view, the grid would sometimes auto-scroll to the top causing the Administration module to relocate the row you were working on. This issue is fixed.

- **Collapse all broken in the item properties pane**

Previously, if you clicked **Collapse all** in the item properties pane, the **No records to display** message displayed and you could not recover the data without leaving the item and returning. This issue is fixed.