



Eos Navigator 3.0

Readme File

This document provides important information about new features and changes in Eos Navigator 3.0.

Contents

New features	2
Enhancements	2
Fixes.....	3
Configured solutions	4
Feature retirement.....	4
Known issues	4

New features

Pending projects

This release of Eos Navigator includes the new Pending projects feature. Use it to track potential upcoming projects that are in a predevelopment state. You can evolve the project information, prepare project notes, and establish the project team, as well as develop shell estimates. When the project is ready for development, you can convert it from pending to active. You can access your pending projects from the new Pending projects section in the navigation pane.

Related Help topics:

Create a project
Convert a project from pending to active
Manage global settings

Enhancements

This release provides numerous enhancements:

- **Revised user experience**
Navigator has a new look. The user experience is updated with numerous visual and practical improvements that help you find, view, and interact with your information more efficiently and effectively. Highlights include:
 - New object indicators to improve navigation within the navigation pane
 - More integrated view design with no selected panel state and panels without borders
 - Tabs for grouped panels now appear at the top of the group instead of the bottom for easy access
 - Collection panels are visually enhanced
 - Information panel appearance is simplified and optimized
 - Totals panels are standardized with new layout options
- **Compatibility with 64-bit operating systems**
Navigator 3.0 is a 64-bit application.
- **Compatibility with Sage Estimating 21.1**
Important. Navigator 3.0 is *only* compatible with Sage Estimating 21.1, which is 64-bit compliant.
- **Miscellaneous enhancements**
This release also includes numerous smaller enhancements:
 - **Restore display state on application startup**
Now Navigator can open where you left off (i.e., the display state) in your previous session. The display state includes the navigation pane node selection and the workspace view.
 - **Navigation enhancements**
Navigator tracks the display state, i.e., nodes you select in the navigation pane, projects and estimates you open or edit, and views you select, and gives you the ability to go back to previous display states by clicking the **Go back** button. You can also open a display state history list and select the desired display state from it.

- **Autohide the panel operations bar**
Once this feature is enabled, you can show/hide individual panel operations bars by clicking an icon in the panel. Hiding a panel operations bar optimizes your panel workspace.
- **Documents panel improvements**
This release contains several improvements to the **Documents** panel, including the ability to move/copy files within the current project folder, between projects, and between Windows Explorer folders and Navigator using drag-and-drop functionality. You can also remove the association with a project document location for a specific project.
- **New estimate fields**
The following fields are now available in the estimate collection and information panels: Submittal date, Approval date, and all project attributes.
- **Disable the Include/exclude from totals feature**
This release includes a new **Global Settings** option that allows administrators to control whether the include/exclude from totals feature is available or disabled.
- **Set note types to inactive**
You can now set a project or estimate note type to inactive if you don't want anyone to use it going forward, but want to preserve existing notes for that note type. A new **Active** check box is available in the **Edit Note Type** window for managing the active/inactive status of project and estimate note types.
- **New panels**
This release includes two new Administration mode panels:
 - **Field Manager panel:** The **Field Manager** panel replaces the **Required System Fields** panel. The panel has a new look and feel that is consistent with other panels in Navigator. In addition to allowing administrators to specify whether a field is required, they can also customize the field format, specify whether the field is read only, and replace the field label.
 - **Attributes List panel:** The **Attributes List** panel is an updated implementation of the **Attributes** panel available in earlier releases. The new panel provides several new capabilities, including: Search, Group, Filter, and Export the attribute list.
- **Launch a custom hyperlink**
Now you can add custom hyperlinks to the About pane that allow you to navigate to other browser locations or websites.

Fixes

This release includes fixes for the following issues:

- When you upgrade to Navigator 3.0, all project and estimate specific note types are added to the managed project and estimate note type list if they don't already exist.
- Previously, Navigator was unable to open a file or folder (from the **Documents** panel) with a comma (,) or equal sign (=) in the name. This issue is fixed in Navigator 3.0.

Configured solutions

This release also offers functionality that can be configured specifically for your company with assistance from Eos Group:

- **Work Request Portal**
The Work Request Portal is a configured solution that allows you to enter new project or estimate information in an external web form that then initiates the new project or new estimate workflow inside Navigator. Contact Eos Support for more information.
- **Custom operations capabilities**
Navigator 3.0 now allows you to extend the behavior of most project and estimate operations. Custom operations can be initiated before or after the base operation and include the following actions:
 - Display input form
 - Display message box
 - Generate notification
 - Generate announcement
 - Execute procedure
 - Execute job

Contact Eos Support for more information.

Feature retirement

The ability to save unpinned panels in views is no longer supported. Unpinned panels are removed from all saved views in Navigator 3.0.

Known issues

This section describes the following known issues in Navigator:

- Access is not restricted for the following estimates when they are opened directly from Sage Estimating or the Estimate Management Console: locked, approved, previous version estimates, estimates in the trash bin, or estimates associated with projects that are archived or restricted.
- Some features have not been implemented for components in Navigator 3.0, such as the ability to move and copy a component, or automatic highlighting of incomplete components. Future releases will include additional component functionality.
- If you rename or delete a report, data, or web panel that is used in a view, the previous panel still appears in the view (while in an unusable state). Remove that panel from the view in Manage Views mode and, for a renamed panel, replace it with the appropriate panel.
- Web panels may not render correctly if Internet Explorer hasn't been removed properly.
- Drag-and-drop functionality between Windows Explorer and the Navigator **Documents** panel does not work properly on Microsoft Windows Server 2012 R2.