



Eos Navigator 3.1

Readme File

This document provides important information about new features and changes in Eos Navigator 3.1.

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New features

Task management

This release of Eos Navigator includes the new Task management feature. Use it to track tasks independently or for a specific project. Task management delivers all the functionality you've come to rely on in Navigator, including the ability to:

- Add new tasks and organize them in groups like task type.
- Associate tasks with projects.
- Assign tasks to users.
- Progress tasks and close completed tasks.
- Move/copy tasks between task types.
- View and manage tasks in a collection grid: Search, filter, and group tasks in the grid.
- Customize collection and window layouts based on your company's needs.
- Manage task-related fields in **Administration** mode.
- Manage access to tasks via Navigator's permissions system.

Related Help topics:

Manage global settings

Manage tasks

View tasks

Create tasks

Edit task information

Change the tasks status

Associate tasks with projects

Move or copy tasks

Set permissions for tasks

Enhancements

This release includes numerous enhancements to existing features:

- **Move/copy estimate enhancements**

Now you can easily move or copy one or more estimates to a different project using a new **Move/Copy to** command available on the shortcut menu in the **Estimates** panel.

Related Help topics: Move or copy an estimate

- **Reprice crews from a Sage Estimating database**

You can now reprice crews in one or more estimates using the current database crews without leaving Navigator. This feature is available from the shortcut menu (**Advanced > Reprice crews**) in the **Estimates** panel.

Related Help topics: Reprice estimate crews from the database

- **Limit the length of text fields**

Administrators can now limit the length of entries for text fields using the new **Character limit** option in the **Edit Field** window, accessed from the **Field Manager** panel (**Administration mode > Fields** view).

Related Help topic: Manage fields

- **Functional roles**

Navigator now distinguishes between types of roles: functional and system. Functional roles are custom roles, created specifically for project teams or tasks, that you can assign to specific users. Examples of functional roles include Project lead, Estimator, Project scheduler, and Quantity surveyor.

Administrators use system roles to manage user permissions, project access rights by project type, and access to views in Navigator. Examples of system roles include Administrator, Advanced user, and Basic user.

Contact Eos Support if you have questions about the use of functional and system roles for your company.

Related Help topics:

Manage global settings

Manage roles

Manage users and groups

Work with project teams

- **Improved navigation pane interface**

The navigation pane was streamlined to increase the available space for displaying your project hierarchy and improve ease of use. The **Projects** mode sections (e.g., Recently Viewed, Active, Pending, etc.) and mode bar options (Projects, Tasks, Manage Views, and Administration) moved to a sidebar on the left side of navigation pane. In addition, the navigation pane operations bar now contains only icons used to work in the navigation pane.

- **Revised Administration user experience**
 Administration mode is updated with numerous practical improvements to help administrators manage Navigator more efficiently and effectively. Highlights include:
 - Revamped view library.
 - Reorganized options in the **Global Settings** panel.
 - Cleaned up fields in the **Field Manager** panel.
 - Exposed additional properties in the **Edit Fields** window (accessed from the **Field Manager** panel). These properties allow you to customize the field label and the format of the display values, as well as prevent the field values from being edited.
 - Reimplemented the **New Attribute** and **Edit Attribute** windows in the **Attributes List** panel.
 - New ability to associate list type fields in the **Field Manager** panel or **Attributes List** panel with the **List** panel. When you select a list field in the **Field Manager** or **Attributes List** panel, the values for that list display in the **List** panel.
 - New ability to associate functional role type fields in the **Field Manager** or **List Manager**, as well as system roles in the **Access Rights** panel, with the **List of Users** panel. When you select a functional role type field in the **Field Manager** panel, the users assigned to that functional role display in the **List of Users** panel. Likewise, when you select a system role in the **Access Rights** panel, the users assigned to that role display in the **List of Users** panel.
 - A new shortcut menu in the **List of Users** panel (**Users** view) provides commands for assigning users to system roles and functional roles, as well as making users available/unavailable for assignment to functional roles.
- **Compatibility with Sage Estimating 21.1**
Important. Navigator 3.1 is *only* compatible with Sage Estimating 21.1 and the Sage 21.1 patch release. See the *Eos Navigator 3.1 System Requirements* for the full version numbers.
- **Miscellaneous enhancements**
 This release also includes several smaller enhancements:
 - **Refinements to the New Estimate window**
 During the New Estimate operation, Navigator now retains input values when selecting a template if the template field values are blank.
 - **Merge the Project Note Types and Estimate Note Types panels (Administration)**
 This release simplifies managing note types for projects and estimates by having a single panel for both note types. Simply select the note types you want to manage from the selection list.
 - **Notes panel improvements (Projects mode)**
 This release improves the visualization of the **Notes** panel so it matches other user interface changes in Navigator and better support the use of additional note types.

Configured solutions

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

Customize the New Estimate and Rename Estimate windows

Your Eos consultant can add custom fields to the **New Estimate** and **Rename Estimate** windows, set the order of the fields, and include the fields in custom sections configured for your company. Contact Eos Support for more information.

Feature retirement

The following features have been retired:

- **Save unpinned panels in views**
The ability to save unpinned panels in views is no longer supported. Unpinned panels are removed from all saved views in Navigator 3.0 and later.
- **Sage Estimating Job Classifications panel**
The **Sage Estimating Job Classifications** panel is not available in Navigator 3.1 and later. You can edit and maintain **Sage Estimating Job Classification** fields in the **Field Manager** panel (**Administration** mode > **Fields** view).
- **Notification panel**
The **Notification** panel is not available in Navigator 3.1 and later because it is no longer needed.
- **Duration type attributes**
Duration type attributes are not supported in Navigator 3.1 and later.
- **Autosize the navigation pane**
Autosizing of the navigation pane is not supported in Navigator 3.1 and later.

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 3.1, 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.
- In **Administration** mode, if you edit and replace a list value that is used in a Sage estimate, the list value is updated in Navigator, but not in the Sage estimate. For example, if you replace a member value in the **List Manager** and that value is assigned to the **Estimator** field in an estimate, your change is reflected in Navigator, but not in the Sage estimate. Likewise, if you change a Job Classification list value in the **Field Manager** and that value is assigned to an estimate, the value is updated in Navigator, but not in the Sage estimate.