



Eos Navigator 3.2

Readme File

This document provides important information about new features and changes in Eos Navigator 3.2.

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New features

This release of Eos Navigator includes the following new features:

- **Custom estimate fields**

This release introduces custom fields at the estimate level. You can create estimate fields for any of the common field types (date, list, numeric, text, etc.) and include them in collection and information panels.

Related Help topics:

Manage fields

- **Type-specific fields**

Now you can associate fields at the estimate and task level with specific estimate types (e.g., conceptual, feasibility, detailed) or task types (e.g., preconstruction, construction, change orders, history) that the administrator defines in **Administration**. Type-specific fields appear only in the information and collection panels for estimates or tasks of the applicable type.

Related Help topics:

Manage fields

- **New batch approval workflow**

With Navigator 3.2, you can send multiple estimates through the approval workflow at one time. The **Estimate Approval** window shows the current approval status for all the selected estimates.

Related Help topics:

Submit estimates for approval

Approve estimates

Reject estimates

- **Estimate Board**

The new **Estimate Board** panel helps you visualize the state of your estimates by estimate status or estimator. Estimates are represented as tiles on the board and can be sorted or moved between columns. The color of the tile border indicates the status of the estimate. Administrators can configure the color assigned to the various statuses in the **List of Estimate Status values** panel (**Estimate fields** view) in **Administration**.

Related Help topics:

Work with the Estimate Board

- **Task Board**

Navigator 3.2 also includes a new **Task Board** panel that shows the tasks for a specific project by task status, owner, or priority. Tiles represent the tasks and can be sorted or moved between columns. The color of the tile border indicates the task status. Administrators can configure the color assigned to the various statuses in the **List of Task Status values** panel (**Task fields** view) in **Administration**.

Related Help topics:

Work with the Task Board

Enhancements

This release includes numerous enhancements to existing features:

- **Enhanced board functionality**

This release refines the appearance of the board panel and extends the board functionality. All of the tile content is now configurable using the new layouts feature for tiles. In addition, your Eos consultant can configure the grouping field list and sorting field list to include any custom field your company wants to use for grouping or sorting tiles. The record count for each column on the board now appears in the column labels. Tiles for new projects, estimates, and tasks are also highlighted on their respective boards.
- **Improved collection panels**

Eos continues to improve the collection panels based on client feedback. This release includes the ability to freeze columns in collection panels. In addition, you can add role type fields to the project and task collection panels. Navigator also highlights new records (i.e., new projects, estimates, tasks, etc.) in the collection panels.
- **Enhanced Layout Details window**

With this release, you can display more project fields in the **Estimate** and **Task** information and collection panels. By default, project fields are hidden in the **Available fields** list for panel layouts. Now you can show or hide project fields in the **Available fields** list using the new icons (☰ and ☷) in the **Layout Details** window.
- **Ability to include multiple information or collection panel instances in views**

This release adds even more flexibility to views and provides the ability to add multiple information or collection panels to a single view. You can now rename a panel, assign a default layout, and remove the layout selector, which allows you to dedicate each panel instance to a specific purpose within the view.
- **Updated navigation pane interface**

This release includes additional refinements to the navigation pane interface for increased ease of use.
- **Additional field configuration options**

Now administrators can configure Navigator to specify a default value or prevent blank values for certain fields based on your company's business needs. You can also edit read only fields for projects, estimates, and tasks while in a template state.
- **Revised rules for non-compliant status**

With this release, the rules for non-compliant projects, components, estimates, and tasks expand to address additional conditions required for compliance.
- **Refined Include in Totals functionality**

You can now change the *Include in Totals* state for an approved estimate. This release also allows you to view project totals when the **Include in Totals** feature is disabled.
- **Enhanced Manage View mode user interface**

This release enhances **Manage View** mode and brings the user interface into alignment with **Project** and **Administration** mode. For example, views are now organized by mode in the **Views** list. Additional panel association combinations are available for even greater flexibility.









- Refined Administration mode experience**
 This release refines the **Administration** mode experience with revised views and panel configuration capabilities.
 - Changed how new custom project fields (called *attributes* previously) are assigned to project types. New custom project fields are now assigned globally by default. You can still reassign these fields to individual project types on the **Classifications** panel.
 - Simplified the process for editing fields. Now you can edit all fields in the **Field Manager** panel. The single **Fields** view has been replaced with separate **Project fields**, **Component fields**, **Estimate fields**, and **Task fields** views.
 - Improved the **Field Manager** panel by exposing additional fields and including additional properties to make it even easier for administrators to manage fields.
 - Included the filter feature in the **Field Manager** panel and **User** panel.
 - Added shortcut menus to some of the panels (**User** panel, **Field Manager** panel, **List Manager** panel) to support quick access to common editing operations.
 - Enhanced the **List** panel by cleaning up the grid, exposing more fields, adding the ability to retire list values (mark them *inactive*) that are no longer in use, and adding the ability to export and import list values to/from Microsoft Excel to streamline list management.
- Additional project permissions**
 Administrators now have the option to set separate user permissions for converting and archiving projects independent of the manage projects permission.

Configured solutions

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

Display inline images in panels

Your Eos consultant can configure Navigator to display inline images next to list values in collection panels. Images can quickly communicate information at a glance to users. For example, images could be assigned to different task statuses in the **Tasks** collection panel.

Task name	Task Type	Project	Due date	Task Status
Complete design review	PreCon	Cliff House*	11/10/21 2:40 PM	 In progress
Conduct acceptance testing	PreCon		10/27/21 2:40 PM	 In progress
Conduct site visit	Execution	Cliff House*	11/10/21 2:40 PM	 New
Conduct training	Execution		10/27/21 2:40 PM	 New
Conduct weather study	Feasibility	Acadia VIP Resort*	11/03/21 2:40 PM	 Assigned
Confirm lumber pricing	Maintenance		11/09/21 2:40 PM	 New
Confirm steel pricing	Maintenance		11/09/21 2:40 PM	 New
Deliver proposal	Execution	Cliff House*	11/17/21 2:40 PM	 Assigned

Customize the New, Rename, and Edit windows for projects and estimates

Your Eos consultant can help you customize the fields that display in the following windows by adding fields, setting the field order, and including the fields in custom sections: **New Project**, **New Estimate**, **Rename Project**, **Rename Estimate**, **New Task** and **Edit Task** windows.

Advanced project folder options

Your Eos consultant can help you expand the folder hierarchy for new projects to include additional parent folder levels (e.g., client, office, year, etc.).

Fixes

This release includes fixes for the following issues:

- The ability to assign multiple list field values was reinstated in Navigator 3.2.
- Previously, you could not restore projects to an archived state from the trash. This issue is fixed in Navigator 3.2.
- Boolean labels for grouping fields displayed True and False instead of Yes and No. This issue is fixed in Navigator 3.2.
- The non-compliant check now properly evaluates required field status.
- Previously, the automated email notification for approved estimates was enabled by default. It is now disabled by default.

Feature retirement

The following features have been retired:

- A custom field can no longer be assigned to both a project and component type. In Navigator 3.2 and later, custom fields are created exclusively for a specific object.
- The duration and ratio field types are no longer supported in Navigator 3.2 and later.
- The **Attribute List** panel (**Administration** mode) is not available in Navigator 3.2 and later because its functionality was added to the **Field Manager** panel.
- The **Edit submitted estimates** permission is not available on the **Permissions** panel (**Administration** mode) in Navigator 3.2 and later.
- The **Edit estimates after final approval** permission is not available on the **Permissions** panel (**Administration** mode) in Navigator 3.2 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 3.2, 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.
- In **Estimate fields** view (**Administration**), the **Mark as active/Mark as inactive** and **Set as default** shortcut menu items are not available for Job Classification fields (list type) in the **List of values** panel.