



# Eos Cortex Project History 1.13.2

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Readme File

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

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# New features and enhancements

This release of Cortex Project History includes the following new features and usability enhancements in the initial 1.13 release:

- **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 them 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.

## Fixes & enhancements after initial release

The following fixes & enhancements were applied in version 1.13.21229.01 (Maintenance release 1)

- **Baseline project name display in high-low charts**  
Previously, the baseline project name would fail to display in the high-low chart legend if it exceeded a certain length. Now the project name will wrap to the next row as needed.
- **Invalid browse hierarchy display when records contain blank values**  
Prior to this release, if fields used in a project or element browse hierarchy were left blank, levels would display incorrectly in the browse views and item would be omitted from the single project elements page. Now these records will appear correctly under an \*Unassigned\* grouping.
- **Browse term matches for text fields with case differences result in errors**  
When text fields are used in browse views and values are imported for different records that matched except for case (e.g. Office vs. OFFICE), errors would occur when importing and publishing. Now the system will create separate browse groupings for matching terms that vary by case.
- **Compare KPI views cause errors under certain conditions**  
Previously, a KPI view would cause errors if it included fields created after projects in the compare were imported.
- **Filters ignored by select all checkbox in the Import/update projects grid**  
Prior to this release, when you filtered the Import/update projects grid and marked the select all checkbox, the system incorrectly selected all records so that if you then clicked the Delete import history button, all records would be deleted. Now, only the records visible after applying the filter are selected when marking the select all checkbox.
- **Incorrect date sorting in collections**  
Date sorting was broken in previous versions. In this version, date sorting has been corrected and sorting any type of column has been enhanced so that values are always displayed at the top and blanks are sorted to the bottom.
- **Address line ignored by maps when driven by an expression**  
The Address line field is the first place the system looks for an address to pin a project on the map. Previously the Address line value would be ignored when driven by an expression, (e.g. a concatenation of Address, City, State, and Postal code). Now you can drive Address line with an expression and the map will use the resulting address value.

Cortex Project History version v1.13.22117.01 (Maintenance release 2) includes the following fixes and enhancements:

- **Faster searching and browsing**  
Searching and browsing large numbers of projects, elements, and items has been optimized to load the collection results faster. The improvement is more noticeable as the result set gets larger. For example, our testing indicates that searches returning approximately 2,000 records are twice as fast.
- **Factored flat data export for external reporting tools**  
Cortex lets you export flattened data to Microsoft Excel for use as a data source with external reporting tools, such as Microsoft's Power BI. Previously, the exported data was native even after opening a factored portfolio and exporting from a factored collection. Now Cortex exports the normalized values.
- **Managing project image thumbnails**  
Previously, if you uploaded an image file without setting it as a thumbnail, there was no way to make it a thumbnail later without uploading it again. Now you can use the **Edit Link** window to make any image a thumbnail, and if desired, set it as the default project image.
- **The Recently published ribbon is now the Recently added ribbon**  
The **Recently published** ribbon was intended to show the 10 projects added most recently to the system, but performing other tasks, like editing a project or running an administrative refresh, would cause older projects to appear in the ribbon. Now the ribbon shows only the 10 most recently imported projects and the ribbon title is **Recently added**.
- **Quieter license expiration warnings**  
In earlier versions, when your license was within 90 days of expiration, Administrators started receiving warning messages. At 60 days, Content managers were included and at 30 days, all users received the warnings. Now, only Administrators receive license expiration warnings.
- **Increased file size limit when uploading attachments**  
The file size limit for attachments has been increased from 30 MB to 50 MB.
- **Incorrect statistics in Excel export**  
Previously when you exported a subset of records from a collection to Microsoft Excel, the statistics still calculated based on the entire collection. The statistics now display correctly based on the selected records.
- **Persistence of high-low chart legend settings**  
Now when you make changes to high-low chart legend settings, such as the average and trend line display, your selections remain in place as you navigate to different pages and charts in the system.
- **Axis label display on high-low chart**  
Prior to this release, certain data conditions would cause the axis labels to not display. This issue is fixed.
- **Money based filters fail when coming from browse**  
Before this patch release, when you opened a collection while browsing, filtering on a money-based field (e.g., **Project total**) would fail. Now all filters work as expected when opening a collection while browsing.
- **Scatter chart fails when all axis values are the same**  
The scatter chart would fail to display in cases where the data values for a given axis were all the same. This issue is fixed.

- **Charts in collection fail to filter chart options based on selections**  
Previously, if you selected a subset of records in a collection and opened chart view, chart options not applicable to the selected records would display. Now only chart options applicable to the records selected for charting are available.
- **Certain charts fail in Compare KPIs in confidential mode**  
This release contains a fix for an issue that prevented certain Compare KPI views from being charted while in confidential mode.
- **Data refresh incorrectly triggered when renaming a field in Administration**  
Previously, when renaming a project, element or item field in the Administration module, the system incorrectly indicated that a data refresh was required to complete the change. This has been fixed. Only a browser refresh is needed in the Inquiry module in order to see field name changes.