Eos Navigator 3.3

Readme File

This document provides important information about new features and changes in
Eos Navigator 3.3.

Contents

Enhancements

This release includes numerous enhancements to existing features:

- **Display tasks for pending projects**
  Tasks for pending projects now display in **Tasks** mode along with the tasks for active projects.

- **Change the assigned due date for tasks**
  You can change the due date assigned to tasks by right-clicking the task in the **Tasks** panel, clicking **Change Due Date** in the shortcut menu, and entering or selecting a new date.

- **Display the Versions panel in project group view**
  With the release of Navigator 3.3, you can include the **Versions** panel in project group views.

- **Create custom layouts for the Version History window**
  In addition to the layouts that were available for the **Version History** window in earlier releases, you can now create custom layouts for the window using the standard layout functionality available for collection panels.

  Related Help topic: Manage collection layouts

- **Show/hide empty fields in Information panels**
  Now you can show or hide fields that do not contain values in an **Information** panel by clicking ≡ (**Show empty fields**) or ≣ (**Hide empty fields**) in the panel operations bar. This enhancement improves data visibility in **Information** panels.

- **Approvals refinements**
  This release includes miscellaneous format refinements to optimize the estimate approval user experience. The **Estimate Approval** window now provides additional information to help guide users through the approval process.

  Related Help topic: Manage estimate approvals

- **Autohide the panel operation bar**
  When panel operation bars are hidden, you can temporarily show a panel's operation bar by hovering in the gray space just below the panel title bar. When you move the cursor away from the panel and start working elsewhere in the application, Navigator autohides the panel operation bar.

- **Show/hide specific panel operation bar icons**
  In **Manage Views** mode, administrators can select which operation bar icons display in each panel within a specific view to customize the user experience for your company. These settings apply to all users regardless of their role.

  Related Help topic: Manage views

- **Navigator information pane enhancements**
  This release provides the following enhancements to the Navigator information pane:

  - **Refresh the license information**
    In the Navigator information pane, you can refresh the license count (number of licenses in use) and the list of users currently signed into Navigator by clicking ↻ (**Refresh license information**) next to the **License count** field.

  - **Copy the Navigator log to the clipboard**
    Navigator 3.3 simplifies the process for providing system information to Eos Support when troubleshooting Navigator issues.

  Related Help topic: Eos Navigator information

- **Administration enhancements**
  Navigator 3.3 includes the following **Administration** enhancements:

  - **Specify project and estimate fields used in Cortex**
    In **Administration** mode, you can indicate which project (**Project fields** view) and estimate fields (**Estimate fields** view) are also used in Cortex. In addition, the project and estimate **Information** panel includes a new shared layout for Cortex fields so you can see only the Cortex fields in the **Information** panel as needed. This functionality helps simplify the integration between Navigator and Cortex.

  - **Mark fields as inactive**
    Administrators can retire fields that are no longer in use by marking them inactive in the appropriate fields view (**Project fields**, **Estimate fields**) in **Administration** mode. Inactive fields are not available in the **Layout Details** window when configuring panel layouts or other windows that allow you to select from a list of available fields.

  - **Show/hide inactive fields**
    In **Administration** mode, you can show or hide inactive fields in the **Project fields** and **Estimate fields** views by clicking ☰ (**Show inactive fields**) or ☰ (**Hide inactive fields**) in the panel operations bar.

  - **Export Administration panel lists**
    You can now export the content of many **Administration** list panels to Microsoft Excel. This maintenance feature is helpful for reviewing Navigator field lists.

  - **Initiate operations from field list shortcut menus**
    Numerous operations are now available from shortcut menus in the **Field Manager** panels within **Administration** mode, including the ability to assign the estimate type, mark fields as read only, mark fields as required, mark fields as Cortex fields, and mark fields as active/inactive. Shortcut menu access makes it easy to apply operations to multiple fields at a time.

  - **Display the record count in Administration panels**
    Now **Administration** panels display the record count next to the panel title; for example, **3 of 15 selected** or **5 filtered**. The record count changes as you work with records in the panels.

  - **Add multiple values to lists (Administration mode)**
    Navigator 3.3 makes it easier to add multiple list values in **Administration** mode. When you need to add several list values, keep the **New value** window open by clicking **Apply** after you enter each new value.

  - **Estimate version permissions**
    Previously, **Estimates** permissions also applied to estimate versions. Now administrators can set permissions for the estimate versions feature (**Administration** mode > **Permissions** view > **Versions**) independent of the **Estimates** permissions.

Configured solutions

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

Customize the Totals panel

Your Eos consultant can help you configure the **Totals** panel at the project and estimate levels to include user-defined cost categories, multiple named addons (markups), user-defined subtotals, and a new **Factor** column. Note that customizing the **Totals** panel will require additional configuration and integration to ensure that totals update as desired.

Custom data panel enhancements

This release includes significant data panel enhancements that support advanced, interactive workflows to meet our client's unique business needs. For example, your Eos consultant can help you set up custom data panels that can be edited by users. When an editable data panel is configured, Navigator does the following:

- Adds an **Edit** permission for the panel to the **Permissions** panel (**Administration** mode > **Permissions** view) so you can limit, by system role, which users have permission to edit data in the panel.

- Creates a **Save** operation for the data panel in **Custom Operations** (**Administration** mode > **Workflows** view) so other actions can be configured to take place when users save data panel changes.

Fixes

This release includes fixes for the following issues:

- **Memory management optimization**
  Memory management was optimized throughout Navigator to improve performance and address memory leaks.

- **Restore previous display state at startup**
  In some cases, Navigator did not return to the previous display state when starting a new Navigator session. This issue is resolved in Navigator 3.3.

- **Classifications cannot be reordered in Administration mode (Classifications view)**
  The **Classifications** panel was not supporting drag-and-drop and the ability to re-order the classifications. This issue is resolved in Navigator 3.3.

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 3.3, 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.