



Eos Navigator 3.7

Readme File

This document provides important information about new features and changes in Eos Navigator 3.7.

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New features

This release of Eos Navigator includes the following new features:

- **Project location panel**
You can use the new **Project location** panel to see the location of one or more of your projects on a topographical map. This feature is especially helpful for visually assessing the proximity of projects in a collection. Administrators can modify the details that appear in the project hover tips when hovering on a project location marker.

Related Help topic:

Show project locations on a map

- **Reprice Sage Estimating items from a database**
A new shortcut menu option in the **Estimates** panel gives you the ability to reprice one or more estimates from a standard cost database.

Related Help topic:

Reprice estimate items from the database

Enhancements

This release of Navigator includes numerous enhancements to existing features:

- **Navigation pane grouping hierarchy modifications**
The **Show projects in navigation pane** and **Show estimates in navigation pane** options are no longer available in **Administration > General** view. You can now show projects in the navigation pane by editing a grouping hierarchy and selecting the **Show project nodes** check box in the **Grouping Hierarchy Details** window.
- **Updated Administration mode user experience**
Administration mode is updated with numerous practical improvements to help administrators manage Navigator more efficiently and effectively. Eos Group invested heavily in optimizing the Navigator user experience and improving usability in this release. Highlights include:
 - Reorganized the options in the **Global Settings** panel.
 - New display options for setting the default mode and state in effect when starting Navigator.
 - Revamped the **Field Manager** panel and retired the **List Manager** panel to simplify list management. Now when you select a list field in the **Fields** section of the **Field Manager**, the values for that list appear in the **List of values** section. If you select a different type of field, the **List of values** section is closed to optimize the real estate available to **Field Manager** columns.
 - Revised the available field types in the **Field Manager** to communicate a field's purpose more accurately. The **Number** field type replaces the **Currency** field type, and the **Quantity** field type replaces the **Numeric** field type.
 - Added the ability to include descriptions with list values. Administrators can enable descriptions for list fields, as needed, and enter descriptions for list values when adding or editing values.
 - A new **Administration** view, **Other fields**, provides access to lists that were previously managed in the **Lists** view: **Company**, **Country**, **Evaluation status**, **Section**, **State**, **System role**, and **Unit**.

- **Miscellaneous enhancements**

Navigator 3.7 includes several miscellaneous enhancements, including:

- The controls for grouping and sorting activities moved from the **Activity schedule** panel operations bar to the **Layout Details** window for **Activity schedule** panel layouts.
 - The ability to combine like activities in the **Activities** panel and combine like tasks in the **Tasks** panel.
 - A new setting in the **Panel Settings** window (**Manage Views** mode) lets administrators restrict users' ability to customize layouts for specific collection panels, information panels, totals panels, board panels, and the **Activity Schedule** panel for views. This setting is panel and view specific.
- **Compatible with Sage Estimating 22.1.2309.061.** (See the *Eos Navigator 3.7 System Requirements* document for a complete list of compatible versions.)
 - **Compatible with Sage Estimating 23.1.2311.151.** (See the *Eos Navigator 3.7 System Requirements* document for a complete list of compatible versions.)

Feature retirement



Important. With the release of Navigator 3.7, Eos Group has formally retired the Component object. **Clients who currently use Components should not upgrade to Navigator 3.7 until they can discuss their Navigator configuration with Eos Support.**

The following features have been retired in Navigator 3.7:

- The **Show projects in navigation pane** and **Show estimates in navigation pane** options were removed from **Administration > General > Global Settings**. When you configure your navigation pane groupings, you specify whether projects and estimates display in the navigation pane.
- **The Restrict project details** option was removed from **Administration > General > Global Settings**.

These features will be updated in a future release of Navigator:

- The estimate approval workflow will be revised in a future release of Navigator.
- The project classification system will be re-implemented in a future release of Navigator.
- The estimate validation capability will be incorporated into the evaluation feature in a future release of Navigator.
- Eos Group no longer encourages the use of Sage reportable views for custom solutions. The icons for managing Sage reportable views (🔍 and 🗑️) will be removed from the navigation pane operations bar (**Administration** mode) in a future release of Navigator.

For more information about any of these upcoming changes, contact Eos Support.

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.
- 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.
- 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 of Members (Field Manager)** panel 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 **Active** and **Set as default** shortcut menu items are not available for **Job Classification** fields (list type) in the **List of values** section.
- Sage Estimating 23.1 added new functionality to the Estimate Management Console and the **Estimate Information** window. You can now define a list of project types, define a list of estimators, specify field types (list, text, numeric, or date) for user-defined Job Classifications, and define a list of values for list type Job Classification fields. Navigator 3.7 uses its own lists and field types for these fields and does not honor Sage's new field type and list functionality.