

RELEASE NOTES ESTIMATING XG

RELEASE INFORMATION

This document is for Build 2.1.0.131 of XG. Build date 03/03/2016. This release note is for the following components only:

- XG Framework
- XG Common
- XG Estimating
- XG Reporting (related to XG Estimating)

INCLUDED IN BUILD ?

The following items have been included or updated since the last release.

ENHANCEMENTS AND NEW FEATURES

JIRA ID	DESCRIPTION
MEPEU-1187	Product Search – Search criteria is now retained when the screen is closed and reopened
MEPEU-1077	Reports – An additional option has been added to include ‘Unpriced Items only’, this option defaults to on for the ‘Unpriced Items’ report. An unpriced item is deemed to be one where a material, labour or subcontract value is marked as ‘Unconfirmed’
MEPEU-1052	Administration – Added Net Price fields to the batch update routine
MEPEU-1018	Reports – added additional BoQ collate options to allow the collation of items with the same Page and Reference number
MEPEU-1016	Reports – We have made the ‘Labour Cost’ field available on Takeoff reports
MEPEU-1014	Material Substitutions – The same target item may now be used within a single substitution group
MEPEU-1013	General – The ContractMaster estimate import option has been optimised to increase the speed taken to import

BUG FIXES

JIRA ID	DESCRIPTION
MEPEU-1278	Takeoff – When a speed menu is shared from another company it can now be correctly accessed
MEPEU-1276	Administration – Rectified a timeout issue within the Discontinued Products routine and that performed actions only relate to filtered items
MEPEU-1134	Takeoff – Resolved the issue where kit items could import with incorrect values when importing ContractMaster estimates
MEPEU-1105	Takeoff – The ‘Subcontractor Factor’ label in the takeoff import routine has been correctly labelled
MEPEU-1079	Takeoff – Cured refresh issue where the Manufacturer / Range / Commodity fields could appear incorrectly for items added to the takeoff
MEPEU-1078	General – Resolved an issue where it was possible for 2 users to create kits with the same reference

MEPEU-1095	Takeoff- The speed menu now doesn't overlap on to a second display when using multiple monitors
MEPEU-1049	Takeoff – Resolved an object reference not set to instance of object error when taking off a large quantity of items from the speed menu
MEPEU-1048	Reports – Resolved the issue which prevented a user from renaming or deleting a custom report
MEPEU-1044	Administration – When adding user related items to a database item the labour column is populated on the Product Search screen
MEPEU-1030	Tender – Prime Cost Modelling screen now ordered by ID
MEPEU-1017	Takeoff – Resolved an error that occurred when using the Planning Export routine
MEPEU-1013	Estimate Import – The ContractMaster estimate import routine has been optimised to decrease the time taken to import an estimate
MEPEU-953	Administration – The 'Rebuild Description' button in Speed Menu maintenance now only updated the description of selected items
MEPEU-952	Reports – Newly created reports now save to the correct company when multiple companies exist
MEPEU-949	Administration - Resolved speed menu maintenance issue where adding numerous items in one go resulted in duplications
MEPEU-948	Takeoff - Rectified a recursion error when adding products with related items in Takeoff
MEPEU-938	Takeoff – User defined Manufacturers now appear within the Product Search routine
MEPEU-930	Takeoff – Rectified a bad request error when searching for a catalogue number with an '&' character

INCLUDED IN BUILD 118

The following items have been included or updated since the last release.

ENHANCEMENTS AND NEW FEATURES

JIRA ID	DESCRIPTION
MEPEU-897	General – The Product Search now has improved performance and discontinued items may now be hidden
MEPEU-808	General – New system option to default newly created Enquiry folders to have no user permissions assigned, also added an option to cascade Enquiry folder permissions from a parent folder
MEPEU-758	Reporting - Additional fields have been made available for Takeoff and Bill reports: Added the following fields from estimate items Scrap Percentage Accessory Percentage Major Range Minor Range Material Markup Category Labour Markup Category Subcontract Markup Category Added the following fields from product database Product Code User Code

	EDP Code Price Code Product Product Type Other description Material Colour Finish Catalogue Number 1 Catalogue Number 2 Material Category
MEPEU-793	General - Added the ability to define default Enquiry attachment folder structures File/Settings/Enquiry Options
MEPEU-791	Enquiries – Added the Estimate Description to the right click to open option on the enquiries list
MEPEU-790	Settings – Added an option to default against new estimates, ‘Use Supplier Best Discounts’

BUG FIXES

JIRA ID	DESCRIPTION
MEPEU-898	Reporting – Resolved a timeout issue on Takeoff reports when the ‘Collate like items’ option is used
MEPEU-894	Takeoff – Resolved an issue where zero trade priced items with a net price were set to zero when taken off
MEPEU-890	General – Rectified an issue where the Active Product Selector was being incorrectly cleared when multiple companies were defined
MEPEU-822	Enquiries - Estimates imported from ContractMaster now include level adjustment percentage data
MEPEU-810	Tender - Resolved an issue which could affect Bill Adjustment and Schedule of Rate values if level adjustment percentages were used
MEPEU-806	Enquiries - Estimates imported from ContractMaster now include section multiplier data
MEPEU-803	Takeoff - Resolved an error when viewing product details on an item within an estimate imported from ContractMaster
MEPEU-769	Enquiries - Resolved issue where ContractMaster estimates couldn’t be imported on 64 bit environments
MEPEU-759	Reporting - Resolved a ‘Grouping error’ when running Totals reports from the Takeoff Screen
MEPEU-755	Discontinued Items – Resolved error if you add the ‘Material Category’ column in to the view
MEPEU-754	Speed Menu - Rectified issue where you couldn’t add a new folder after moving existing folders Up / Down
MEPEU-739	Product Search - Corrected error that displayed when selecting the Direct Entries tab
MEPEU-228	Takeoff – Collated kits now show totals on the header line
MEPEU-216	Enquiries - Resolved an issue which meant that an estimate couldn’t be copied in certain circumstances in a multi user environment

INCLUDED IN BUILD 104

The following items have been included or updated since the last release.

JIRA ID	DESCRIPTION
MEPEU-655	Creating Enquiry Folder groups containing an apostrophe character in the description no longer causes an error
MEPEU-630	Improvements to the Products – Import Supplier Discount/Net Price Details routine to allow the import of a combination of net prices and discounts at the same time.
MEPEU-562	The Summary Totals screen now sorts by Code, except Fixing Phase and Grade, which are by Description
MEPEU-476	Takeoff Import errors resolved
MEPEU-423	Related Items assigned to a Direct Entry in the Global Library are now added to takeoff when the direct entry is added
MEPEU-407	When launching XG the cursor is now automatically placed in to the user field on the login screen
MEPEU-339	Resolved the issue when the Manufacturer list in Administration was not refreshing until the user logged out and then back in to the software
MEPEU-338	Newly created estimates now appear within the Estimate Directory report
MEPEU-350	The Material Substitution wizard no longer causes to software to ‘hang’ when using the ‘Collate like items’ option
MEPEU-285	Material Substitutions - resolved error 'An item with the same key has already been added' when including Related Items
MEPEU-262	The Tender - Selling Total screen now has an Analysis button to show the results of any Analysis calculations created within the tender style
MEPEU-259	The option to save filters in Discontinued Items can now be selected
MEPEU-243	Enhancements made to the New Company / Luckins Subscriptions wizard
MEPEU-228	Adding the same kit numerous times with the ‘collate’ takeoff option set no longer causes the screen totals to appear incorrectly
MEPEU-221	A new system configuration option has been added ' <i>Users without Tender permission default to Cost Type Mark-up</i> ' in the Estimating -> Takeoff Options -> new Estimate Defaults group. When this option is set and a user without permission to access tender creates an estimate then the 'Use Cost Type Mark-ups' option against the estimate is automatically set.
MEPEU-215	Levels copied within takeoff now paste where the user has selected
MEPEU-209	Issues when deleting levels within the New Estimate Wizard resolved

INCLUDED IN BUILD 81

The following items have been included or updated since the last release.

JIRA ID	DESCRIPTION
MEPEU-406	Importing discount file produces validation errors correctly if content does not exist in the pricing database
MEPEU-292	Grid Filters now perform correctly when using an ‘OR’ statement
MEPEU-291	Level contents are no longer lost when clicking the Undo option after using the Explode

	option
MEPEU-290	Resolved issues that had been reported when copying and pasting the Job Structure
MEPEU-287	Direct Entries that have been saved to the Global Library may now be added to the Speed Menu
MEPEU-256	The 'Exclude from Tender' option on levels now excludes those levels from reports and level totals
MEPEU-239	Related Item quantities no longer go out of sync if the parent item quantity is changed
MEPEU-194	The Dimensions field is now shown against Related Items and the confirmation screen for Related Items
MEPEU-193	Direct Entries that have been saved to the Global Library may now be added as User Related Items

INCLUDED IN BUILD 73

The following items have been included or updated since the last release.

JIRA ID	DESCRIPTION
MEPEU-242	Tender not applying under certain circumstances

INCLUDED IN BUILD 72

The following items have been included or updated since the last release.

JIRA ID	DESCRIPTION
MEPEU-241	If you try to create an estimate whilst on the Client option in enquiries you get : Object reference not set to an instance of an object.
MEPEU-240	Level complete checkbox will lock/unlock level incorrectly
MEPEU-239	Product related items quantities going out of sync
MEPEU-238	Add dimensions field to related items grids on product maintenance edit screen
MEPEU-237	When moving around the level tree quickly, moving sections up/down and scrolling around you can occasionally get a dispatcher error
MEPEU-236	If you cut and paste one or more items in takeoff the items are removed on the cut but when you click paste nothing happens

INCLUDED IN BUILD 65

The following items have been included or updated since the last release.

JIRA ID	DESCRIPTION
MEPEU-226	Error displayed when setting level to takeoff complete
MEPEU-225	Object reference error displayed when using tender with a level tender style
MEPEU-224	Copying kits/items with related items copies deleted related items
MEPEU-223	Estimate takeoff report totals incorrect when using kits expand/contract options

INCLUDED IN BUILD 53

The following items have been included or updated since the last release.

TFS ID	DESCRIPTION
18962	Job Structure facility to be available in the Estimate Wizard
21694	Clients/Client Address/Client Contact \ (and suppliers) - Concurrency/Multi User Testing - empty dialog displayed when opening deleted client/address/contact
28820	Product Batch Update Grouping incorrect
28948	Enterprise XG Migration - Cost Types Option
29210	Tender > Labour - overtime rates can't be free typed
29336	Provisional Sums include MCD (They should not)
29381	Search & Replace Function Not Replacing/Displaying (User) Related Items
29402	Tender > Additional Hours should be based on Productive Hours
29465	Search & Replace field in Takeoff is Not Enabled on Initial Access Following Install of New Build
29559	Job Structure facility to be available in the Estimate Wizard bugs #1
29565	Product Maintenance - Filters
29572	Job Structure facility to be available in the Estimate Wizard bugs #2
29602	Product Batch Update EffectiveDate should be Effective Date
29603	Job Structure facility to be available in the Estimate Wizard bugs #3
29616	Search & Replace Function Not Replacing User Related Items/related items
29618	When upgrading from 2.0.0.x to 2.1.0.x the product maintenance grid can appear blank with validation errors
29620	Duplicate products when company created with shared data
29621	Check decimal place configuration is used on all reports including custom ones
29623	Detailed Tender Report - Pages overflow resulting in blank pages
29634	Prelim Queries
29667	Tender Administration - Tidy up functionality
29682	Takeoff Batch Update Use Supplier Best Discount Timeout