



23.02 RELEASE NOTES

February 10th, 2023

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Release information

| | |
|------------------------------|-------------------|
| Release Version: | 23.02 |
| Release Date (Train): | January 20, 2023 |
| Release Date (Prod): | February 10, 2023 |


Introduction

This document describes the features and functionality of the Lucernex 23.02 release. Bug fixes have been delivered for **Admin, Contracts, Workflows, APIs** and **Reports**.

This release also contains new features and enhancements, such as newly updated **Setup Wizards** and new **security configurations** for copying documents, and updated **Percentage Rent** calculations.

Important tasks related to new releases

Please review this section when you receive release notes:

1. **Update your custom layouts with new fields added in this release.**
Fields added to core pages do not automatically appear on custom-configured pages and you will have to add them to access new functionality. Custom pages have an icon  in the lower-right corner of the page or window.
2. **Review the API updates.**

Ideas for improving Lucernex

We invite you to submit your product enhancement requests on the Lucernex Ideas page. The Ideas page is available [in Accruent Access via the Ideas tab in the toolbar](#). Ideas you post can be viewed by both Accruent employees and other Lucernex customers. On the Ideas page you can:

- vote for or against an idea
- add and respond to comments
- view the status of an idea

Your ideas help us to understand what is important to our customers. Our product management team actively monitors the Ideas page and updates it when required. Contact Accruent Support if you have questions about the Ideas page.

Customer forum

Are you looking to learn new, exciting ways to use Lucernex? Check out the Lucernex customer forum in Accruent Access! There you can collaborate with other Lucernex customers to learn best practices, exchange ideas, and ask questions.

To access the customer forum:

1. Sign in to [Accruent Access](#).
2. Click the **Product Forums** tab.
3. Expand the **Lucernex** section.
4. Pick a category.
5. Start a conversation!

Note: Submit your product enhancement requests via the Ideas tab, as described above. Product Management does not monitor the customer forum.

World Class Academy

With World Class Academy, Accruent is now including access to all standard eLearning courses with all Lucernex software agreements, **at no additional cost, for 25 users**. This will allow more of your employees access to software training, helping to increase your enablement, maximize your software user adoption, and achieve greater software ROI.

Also, coming soon and included in the standard training are new courses on Bidding and Data Dictionary and some additional MicroLearnings. Go to the [Accruent Academy](#) site or reach out to training@accruent.com for more information.

Announcements

This section of our release notes is intended to make you aware of important announcements related to Lucernex.

23.02 customer release webinar

The customer release webinar has been cancelled for the 23.02 release

2023 Release Calendar

Below is the planned release calendar for Lucernex. The Lucernex team reserves the right to make changes to the release schedule if deemed necessary to ensure the quality of the product. Release calendar changes will be communicated via email to Support Contacts and Community Users on your account, as well as in the release notes when possible.

| Release Number | TRAIN | PROD |
|----------------|------------|------------|
| 23.02 | 01/20/2023 | 02/10/2023 |
| 23.04 | 03/31/2023 | 04/21/2023 |
| 23.06 | 05/26/2023 | 06/16/2023 |

| Release Number | TRAIN | PROD |
|----------------|------------|------------|
| 23.08 | 08/04/2023 | 08/25/2023 |
| 23.11 | 10/20/2023 | 11/10/2023 |

2023 Release Webinars

Below is the planned release webinar schedule for 2023. The Lucernex team reserves the right to make changes to the schedule if deemed necessary. Links for each webinar will be included in the release notes for the release, and an up-to-date schedule can be found on the *Webinars* page of the Lucernex Online Help.

| Release Number | Session #1 | Session #2 |
|----------------|-------------------------------|--------------------------------|
| 23.02 | Tuesday, January 24 at 9am CT | Thursday, January 26 at 2pm CT |
| 23.04 | Tuesday, April 4 at 9am CT | Thursday, April 6 at 2pm CT |
| 23.06 | Tuesday, May 30 at 9am CT | Thursday, June 1 at 2pm CT |
| 23.08 | Tuesday, August 8 at 9am CT | Thursday, August 10 at 2pm CT |
| 23.11 | Tuesday, October 24 at 9am CT | Thursday, October 26 at 2pm CT |

Contents of the TRAIN release

The following tables break down the contents of the TRAIN release into new features, client-requested enhancements, and client-reported issues.

New features

The following new features have been delivered in this release.

| Feature | Summary |
|--|---|
| Improvement to Setup Wizard Layouts | We have updated the global layout for the following Setup Wizards: <ul style="list-style-type: none">• Parcel• Facility• Location |
| Updates to the Global Report List | We have updated the Global Report dropdown to remove obsolete, incorrect, or out of date Reports |
| Improvement to Report metadata for Filters | Report filters meta data now properly reflect Fiscal Year runtime filters |

Client-requested enhancements

The following client-requested enhancements have been delivered in this release.

| Feature | Summary |
|------------------------------------|--|
| Updates to Currency decimal values | We modified the following Currencies to accurately reflect the correct decimal points: <ul style="list-style-type: none">• XPF• UGX• CLF |
| Copy Documents Security | We have made it so that you can restrict access to the Copy Documents action button |

| Feature | Summary |
|-----------------------------|--|
| Percentage Rent Calculation | Per Period Breakpoints in partial years no longer pro-rate unless there is a partial month. Additionally, the partial month proration calculation has been modified. |

Client-reported issues

The following client-reported issues have been resolved in this release.

| Component | Summary |
|-----------|---|
| Admin | Manage Membership tool no longer returns a “cache fetch error” when bulk updating Vendor Admin membership |
| Templates | Workflow templates and Summary Page Layouts are now available immediately when an entity is moved from one portfolio to another |
| Contracts | Pass-through payments now generate as expected when a document is attached to the parent transaction |

Resolved Defects

The following known defects have been resolved in this release.

| Component | Summary |
|-------------|---|
| Custom List | When the global property enableMultiBudgetImpactCL was set to true the Edit Form Field pop-up for editing forms and custom lists would require the Budget Type dropdown to be selected. This has been resolved and the Budget Type dropdown is not required for non budget impacting fields. |
| Workflow | When the Admin Reassign feature was executed on a Workflow to add or remove a Member from the Approver list, the Workflow stopped respecting the Requires Approvers flag. The Workflow would progress to the next step with only one approval even when multiple approvals were required. This flag now works as expected and Workflows will only progress if all approvers have taken action when the Requires Approvers flag is set to true. |

| Component | Summary |
|-----------|---|
| Reports | When the Payment Amount and Annual Amount fields were configured on a report, the field data was only visible when the report was run, and not in the Report Preview . Report Preview now works as expected for these fields |

API Updates

The following changes have been made to our API.

Bug Fix

Updating the assigned and unassigned approvers on a workflow via the UI was causing GET calls for unassigned approver stops working and return a 404 error – this has been resolved, call now returns unassigned approver list as expected

Sample GET: `.../rest/workFlowStep/.../approvers?unassigned=true`

New feature details and deep dives

This section describes new features in greater detail.

Setup Wizard Layouts

The layouts for the Parcel, Location, and Facility Setup Wizards have been reconfigured to allow the user to enter more of the relevant information during the Setup process for these entity types.

Global Parcel Set Up Wizard

The following fields have been **added** to the layout:

- Portfolio
- Location
- Use Location Address Checkbox
- Street Address #1 through Street Address #4
- City
- State
- Country
- Postal Code

Labels for the following existing fields have been **updated**:

- “Name” → “Parcel Name”
- “Group” → “Parcel Group”
- “Type” → “Parcel Type”
- “Category” → “Parcel Category”
- “Status” → “Parcel Status”

NOTE: These are **configuration changes only** - there have been no functional changes to how the Set-Up Wizard works.

Global Location Set Up Wizard

The following fields have been **added** to the layout

- Currency Type
- RE Tax Rate #1
- EC Tax Rate #1
- Street Address #1 through Street Address #4
- City
- State
- Country
- Postal Code

Labels for the following existing fields have been **updated**:

- “Name” → “Location Name”
- “Group” → “Location Group”
- “Type” → “Location Type”
- “Category” → “Location Category”
- “Use” → “Location Use”
- “Status” → “Location Status”

NOTE: These are **configuration changes only** - there have been no functional changes to how the Set-Up Wizard works.

Global Facility Set Up Wizard

The following fields have been **added** to the layout

- Rentable Area
- Building Area Unit
- Use Location Address Checkbox
- Street Address #1 - Street Address #4
- City
- State
- Country
- Postal Code

Labels for the following existing fields have been **updated**:

- Name” → “Facility Name”
- “Group” → “Facility Group”
- “Type” → “Facility Type”
- “Category” → “Facility Category”
- “Use” → “Facility Use”
- “Status” → “Facility Status”
- “Parent Region” → “Region”

NOTE: These are **configuration changes only** - there have been no functional changes to how the Set-Up Wizard works.

Global Report Dropdown

The following Global Reports have been removed from the Global Reports dropdown:

- Tax Bill Upload
- All Scheduled Payments by Month
- Approved Contract Expenses
- Contingent Liability
- LEASE ACTION ITEMS

- LEASE ACTION ITEMS – Tracking
- MONTHLY PAYMENT REGISTER – BY AREA
- Payment List by Contract Number, Date
- Payments Due
- Recoveries
- RECONCILIATION REPORT

IMPORTANT NOTE: This change will **not** impact existing reports. If you have already created one of these reports your report will remain unaffected, users will no longer be able to create **new** versions of these reports going forward

Report Filter Data

Previously when report runtime filters for fiscal year were configured, those filters were not showing in the report filters meta data.

This has been resolved and now if a runtime filter "in fiscal," "in/after fiscal," or "before/in fiscal" is set that filter configuration will appear in the report:

| Report-21975 [11/23/2022 01:00:30 PM UTC from 127.0.0.1] | | |
|---|------------------------------|-------------------|
| Filters ExpenseSchedule_BeginDate in fiscal 01/01/2021 and before 11/14/2022 ProjectEntity_ProjectEntityName contains Contract_21975 Entity Types is in: Contracts = ACTIVE | | |
| Name | Expense Type (Expense Setup) | Payment Amount Co |
| Contract_21975 | Interior | \$1,000.00 |
| | Water | \$200.00 |
| | Base Rent | \$5,000.00 |
| | Water | \$60.00 |
| | Base Rent | \$300.00 |
| | Interior | \$1,000.00 |
| | Water | \$200.00 |
| | Base Rent | \$5,000.00 |
| | Water | \$60.00 |
| | Base Rent | \$300.00 |

Currency Updates

The currency **XPF** (CFP Franc) has been modified to reflect the correct number of decimals. Previously XFP values were displayed with two decimal places, now XPF values correctly display **zero** decimals.

The currency **UGX** (Ugandan Shilling) has been modified to reflect the correct number of decimals. Previously UGX values were displayed with two decimal places, now UGX values correctly display **zero** decimals.

The currency **CLF** (Chilean Unit of Account) has been modified to reflect the correct number of decimals. Previously CLF values were displayed with two decimal places, now CLF values correctly display **four** decimals.

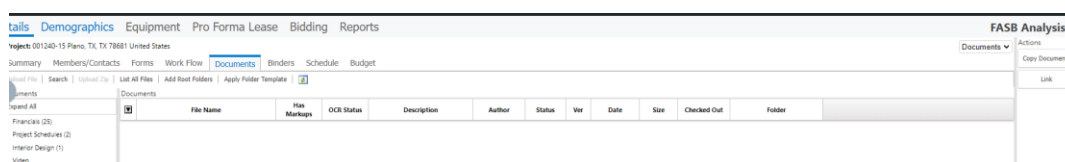
Copy Documents

In the 22.02 Release we delivered the ability to copy documents with the **Copy Documents action button**. This feature allows you to copy documents between entities which have an established relationship, such as between a capital project and a facility.

In this release we have added a new manage security function for controlling the **Copy Documents** action button.

From the Admin Console under Manage Security > Page Access > Administration you will see the new **Copy Documents security** configuration.

If a UserClass has **edit** or **delete** access to the **Copy Documents security**, then they can see this action button on the documents tab:



If a UserClass has **View** or **No Access**, then they cannot see the Copy documents action button.

Percentage Rent

Lucernex historically prorated breakpoints for per period calculations in partial years. A significant number of our customers using the Percentage Rent functionality indicated that per period calculations should not pro-rate UNLESS there is a partial month. Additionally, it was pointed out to us that when there is a partial month that should be pro-rated, the calculation appeared to be incorrect.

Now, the Per Period calculation in a partial year for all periods EXCEPT partial months is Annual Amount divided by Number of Periods equals Per Period Amount.

And, Per Period calculation for partial periods (when the Begin or End date of the contract does not fall on the first or last day of the month respectively) is Number of days in the first OR last month of the lease multiplied by (per period amount/total days in month.)

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Accruent, LLC
11500 Alterra Parkway
Suite 110
Austin, TX 78758

www.accruent.com