



# 23.06 RELEASE NOTES

July 7, 2023

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## Release information

<b>Release Version:</b>	23.06
<b>Release Date (Train):</b>	June 9, 2023
<b>Release Date (Prod):</b>	July 7, 2023

## Introduction

This document describes the features and functionality of the Lucernex 23.06 release which includes [improvements and issues fixed](#) in these areas:

- Date format in Excel report
- Bid Conditioning page spreadsheet
- Report Display Settings
- Filter Outbound email log
- Excel export column layouts
- Text styling

In addition, this release includes new [features and enhancements](#), such as the Dashboard loading indicator, adding the Form ClientID field in Report Builder, Bid Alternate email notifications.

## Features and Enhancements

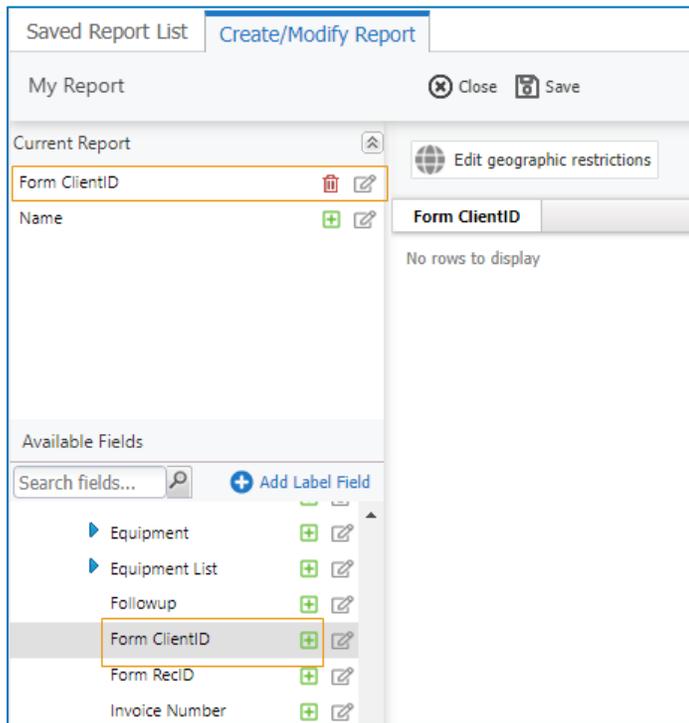
This section describes new features and client requested enhancements in greater detail. Select links in the table for more detail about the enhancement.

Component	Summary	Reference #
Dashboard loading indication	If the dashboard is loading, this is indicated on the new progress bar.	LUC-10447
Custom field type rules	<p>In a previous release, we added the ability to a configure a minimum and maximum value for Number, Currency, and Percentage fields in custom lists.</p> <p>In this release, the Minimum and Maximum values for custom lists now support up to six decimal places.</p>	LUC-9883
Expose the <b>clientID</b> field in the Report Builder for Form records	When you build a form type report using the Report Builder and add fields to it, you can now add the <b>Form ClientID</b> field	LUC-9691
Datamart	If you are a Datamart customer and you manage very large volumes of data, you can now <a href="#">request Datamart granularity</a> in the selection of Lucernex record types to be consumed by the Datamart.	LUC-10828
Bid Alternates amount validation	If you enter a bid alternates amount that would result in a negative Final Bid Amount, a warning is now displayed, and you are prevented from saving the change.	LUC-9122
Bid Alternate email notifications	<p><a href="#">Email notifications</a> are now sent when you add bid alternates by importing a project bid package using a spreadsheet or if one of the following is carried out on the Bid Line Items tab or the Conditioning tab:</p> <ul style="list-style-type: none"> <li>• A new alternate is added</li> <li>• An alternate is turned OFF or ON</li> <li>• An alternate is deleted</li> </ul> <p>An alternate line item or description is edited</p>	<p>LUC-8948</p> <p>LUC-10849</p>

Component	Summary	Reference #
Improved session timeout configuration	We have improved the configuration of session timeouts to reduce resource consumption and enhance performance.	LUC-10527
Drag and drop file with same filename	If you <a href="#">move a file using drag and drop</a> to a location that already has a file of the same name, you can now opt to append or replace the file.	LUC-10514 LUC-10513

## Add Form ClientID

1. In **Available Fields**, select **Available Fields > Forms > ALL**.
2. Scroll to **Form ClientID** and select the **add** icon  next to it. The **ClientID** field is added to the form.



## Datamart granularity

If you are a Datamart customer and you manage large volumes of data that currently take days to synchronize, you can now opt to configure more granularity in the selection of Lucernex record types for consumption by the Datamart. This allows you to reduce the Datamart run times for full brush and deltas.

If you want to use this feature, reach out to your Accruent Support contact and request to turn on the new feature switch **enableDatamartSyncObject**. You can request a specific configuration for the root record and child record types in the Manage Firm Properties **Datamart Sync Objects** drop-down. For example:

- Root Record: Contract
- Child Record: ExpenseSetup, ExpenseSetup/ExpenseSchedule

**Note:** We recommend that you work with Accruent Professional Services contact to ensure that requested configuration does not inadvertently exclude API call that you need for your implementation.

## Email notifications

Lucernex now sends an email notification when a bid alternate is added by importing a project bid package spreadsheet or if one of the following is carried out on the Bid Line Items tab or the Conditioning tab:

- A new alternate is added
- An alternate is turned OFF or ON
- An alternate is deleted
- An alternate line item or description is edited

You cannot update or delete alternate items using the spreadsheet import.

The email notification is sent to:

- bidders and shared bidders who have accepted the bid
- bid package assignees

On shared bids, the system sends the email to all shared bidders and the assignee.

The email subject consists of: [Project Name] - [Bid Package Name] - Bid Alternate Notice.

The email body consists of:

A bid alternate was [added / removed / updated] for [line item]. [hyperlink to bid package]

## Move a file using drag and drop

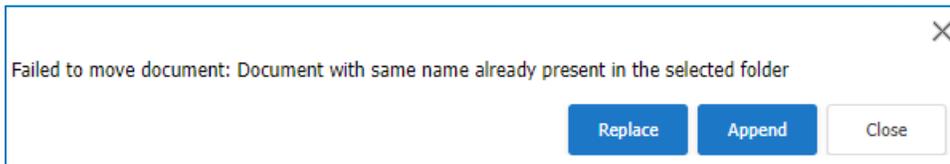
To use this feature, contact your Accruent Support Associate and ask them to turn on the **enableSameDocumentReplaceAppend** feature switch.

Once the feature is turned on, to drag and drop a file from one Lucernex folder to another:

1. Select the file in a Lucernex folder that you want to move so that its check box is selected.
2. In the Lucernex folder, click and drag the file you want to move and drop it onto the Lucernex destination folder you want.

If there is no file in the destination folder with the same name, the file is moved to that folder.

If the file has the same name as an existing file in the destination, a dialog opens.



3. Choose the option you want.

The option you choose, and the number of previous actions determines whether a new file is created, or the existing file is replaced with a new version:

- Select **Replace** if you want to replace the version of the file in the target folder with the version you dragged. This replaces the file and increments the version number of the file in the target folder:

<input type="checkbox"/>	File Name	Has Markups	OCR Status	Description	Author	Status	Ver
<input type="checkbox"/>	 MyFile.xlsx	NO	N/A		Mark Lee	Available	2

- Select **Append** if you want to keep both files. The file that you dragged and dropped is given a new filename consisting of the old filename with the suffix (*n*). In this example, the file has been appended once, so the suffix is (1) and the version is 1 because the file is newly created:

<input type="checkbox"/>	File Name	Has Markups	OCR Status	Description	Author	Status	Ver
<input type="checkbox"/>	 MyFile(1).xlsx	NO	N/A		Mark Lee	Available	1
<input type="checkbox"/>	 MyFile.xlsx	NO	N/A		Mark Lee	Available	2

*n* is incremented by one if you drag a file with the same name again and select **Append**. In this example, (2) is the suffix because this is the second time the same file has been appended in this folder:

<input type="checkbox"/>	File Name	Has Markups	OCR Status	Description	Author	Status	Ver
<input type="checkbox"/>	 MyFile(1).xlsx	NO	N/A		Mark Lee	Available	1
<input type="checkbox"/>	 MyFile(2).xlsx	NO	N/A		Mark Lee	Available	1
<input type="checkbox"/>	 MyFile.xlsx	NO	N/A		Mark Lee	Available	2

## Improvements and issues fixed

This section describes the defects this release resolves and the client-reported issues that we've fixed.

Component	Summary	Reference #
Date format in Excel report	When you configure reports to run with the YYYY-MM-DD date configuration, the Excel view output now reports the date configuration as expected.	LUC-9131
Bid Conditioning page spreadsheet	When you open a spreadsheet downloaded from the Conditioning page of a bid with a large Budget Folder tree, the spreadsheet now opens correctly in Excel.	LUC-8153
Report Display Settings	When the <b>Display multiple values in separate cells</b> check box is cleared in the report display settings, all rows of contact data are now included in the same cell in the report output.	LUC-10592
Filter Outbound email log	If you filter based on empty or not empty when filtering by column in the Outbound Email Log, the system now displays the correct results.	LUC-10636
Excel export column layouts	When you export to Excel, if columns are configured on list layouts, those layout changes are included in the export.	LUC-10782
Text styling	<p>Lucernex now shows the user interface text correctly in the specified style and color. The code to customize the styling is no longer exposed on the user interface. For example, where the wizard title previously displayed a div tag with an inline style with the specified text color:</p> <pre>&lt;div color="green"&gt;Sample Text&lt;/div&gt;</pre> <p>It now displays just the text in the specified color:</p> <p>Sample Text</p>	LUC-10845
Save to Documents	When using the <b>Save to Documents</b> button on the <b>Schedule</b> tab, the columns and rows now render correctly.	LUC-4602

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