



EngineerOffice 2013 Release Notes

Version : 13.0.86.0

Release Date : December-6-2013

FIXED ITEMS:

QuickBooks Integration: (4.0.13.0)

1. Sync tool is updated to be usable with the current version of Java.

Mac Syncing:

1. Updated to be usable with the current version of Java.
2. Enhanced to handle large items in Mail, Calendar and Address Book.
3. Enhanced to handle emails with large list of TO, CC or BCC addresses.
4. Email contents line breaks were not displaying properly.

Dashboard:

5. Filter 'Principal' changed to 'User' in Dashboard Realization widget.

Documents:

6. Corrected a problem when externally adding documents. It would show the date of creation rather than the last modified date.
7. When a user would create New Document from All Docs tab, it would prompt for New Journal which it shouldn't.
8. When opening document with special characters like a parenthesis '(' in the file name or path would fail to open.

Projects:

9. Project Milestones were flip flopping dates when using reversible dates and international date format.
10. After adding a phase to a project, moving that phase up in the phase order, would cause the invoice to not honor the new phase order. Also 'Budget vs. Actual Report' did not honor the new phase order.
11. Anytime a phase is marked hourly, the % column in the invoiced section of the Project Billing Summary screen is transposed into the % column in the Actual section and the invoiced % column is left at 0%.
12. The ability to create a retainer payment transaction applied directly to the project has been disabled. This was causing problems with A/R reporting. Now it



is only possible to issue a retainer payment once all invoices are fully paid off, and unused retainers need to be refunded. All regular mid-project retainer payments must now be applied to an open invoices not to project.

Invoicing:

13. When invoicing, if an entire section of the invoice was No Charge, that entire section was not invoiced at all.

Search Engine:

14. The Project Status field on the Task Search screen would actually search on Task Statuses. The fields label was changed to make this known.
15. The Project Status field on the Project Search screen would incorrectly return both Active and Inactive projects if you searched on "Active"

Time / Expenses:

16. In Time/Expense > Time screen, just above the phase field is a label which indicates what percentage of the budgeted hours have already been entered. This only functioned properly when the selected phase was a Stipulated Sum phase. On hourly phases this number always remained at 0.00%.

Reports:

17. In the Profitability Accrued with Expenses report, the \$Invoiced column would only show expenses and forget to add Additional services.
18. In the Profitability Accrued with Expenses report \$Used column was adding Basic Service time entries even if they were captured in a Stipulated Sum invoice.
19. The \$Budget column was removed from the Profitability Accrued With Expenses report as it does not pertain to that report and was causing confusion.
20. In the Profitability Cash Report the total "\$ Payments" would not count payments which came from a retainer.
21. The Budget vs. Invoiced report displayed incorrect values for the Hours Used and \$Invoiced columns.
22. If a slip was drafted or billed and then the invoice was deleted, the Invoice ID field for the time slips that were on that invoice would not reset to NULL resulting in rare but reproducible reporting issues.
23. Memorized Reports always ran blank.
24. Running any time based report with Summary set to Daily would always render the dates on the report in United States format regardless of settings.



EngineerOffice 2013 Release Notes

Version : 13.0.61.0
Release Date : September-12-2013

FIXED ITEMS:

QuickBooks Integration: (4.0.12.0)

2. The % column in the ACTUAL section of the Project Billing Summary screen frequently shows 0%. This was caused by QuickBooks syncing.

Billing:

3. When batch invoicing from the Billing Module, projects were being incorrectly skipped if they had slips on hold, incomplete, or unapproved, even when those slips occurred solely outside of the Invoices date range.
4. When batch invoicing from the Billing Module, invoices were always being assigned today's date as the invoice date, even if another date was specifically chosen.

Preferences:

1. New option added in Preferences > Users > Other Options screen, to turn on or off the display of the color scheme on the Project > Documents screen.

Project:

1. The retainer, when applied to an invoice, was adding to the total retainer balance instead of subtracting from it.
2. The ability to cap invoicing on an individual project phase was not being honored.
3. The Stipulated Sum grid shown on the Project > Billing > Options screen, was incorrectly adding Additional Services dollars into the values shown in the ACTUAL columns on the grid.
4. Ability to update team rates was not working in certain circumstances.
5. Retainer payments were able to be incorrectly applied in certain circumstances.
6. The ACTUAL columns on the Project Billing Summary screen were not populating data.
7. Invoices were displaying the project's balance even when the invoice option "SHOW INVOICE TOTAL" was selected.
8. Additional Services were not appearing in the Additional Services section at the



bottom of the Project Billing Summary screen.

Reports:

1. Clicking the “RUN REPORT” button in the Reports Module, on several reports, immediately after login, would cause the report process to internally crash and not produce any report.
2. The Budget vs. Actual Report was not including Non-Reimbursable expenses as it should be.
3. The Budget vs. Actual Report was including Reimbursable expenses which it should not be.
4. The Budget vs. Actual Report was incorrectly including Additional Services time in the “\$ Used” column.
5. The Budget vs. Actual Report was incorrectly including the projects current draft invoice when calculating values in the “Hrs Billed” and “\$ Billed” columns.
6. The “Print Statement” link on the Project > Billing > Invoices screen was incorrectly producing a report that included any draft invoice that existed on the project at the time.
7. Accounts Receivable Reports were looking at an incorrect data point, causing them to incorrectly show many negative values.

Time / Expense:

1. In certain rare circumstances, time slips could jump to another project.
2. In certain rare circumstance, clicking the ME button could allow users to enter time on a project that they were not assigned to.

Search Engine:

1. Doing a search in the Time/Exp Module’s FIND screen, would always return zero records if the search criteria included a search by Project Leader.
2. Doing an invoice search, it would only show draft invoice numbers.

General:

1. Various screens throughout the software have been reworked to increase loading speed, and overall performance.

EngineerOffice 2013 Release Notes

Version : 13.0.48.0
Release Date : July-29-2013



FIXED ITEMS:

QuickBooks Integration:

5. Now service type items on a QuickBooks invoice are transferred as labor and items of type other charge, inventory and non-inventory are transferred as reimbursable.
6. Now we can set the default person for all expenses we get from QuickBooks.
7. If we set rate type as fixed for an employee in the Expense screen and make some adjustment by total charge and apply it to expense. Now make an invoice and we see that the adjustment does not transfer to QuickBooks.
8. Wrong amount adjusted in QuickBooks if we set rate type as fixed.
9. Default pay method has been set to Check.
10. Adjustments to stipulated sum invoices were not transferring to QuickBooks in certain circumstances.
11. When project is duplicated and transferred to QuickBooks, its sub phases transfer as a main phase.
12. Invoices with fixed rate expense slips showed wrong value in QuickBooks.

Billing:

13. If a project has the 'Slips Require Approval' checkbox marked and it has billed time entries, in Billing>Projects it will be shown as having unapproved slips.
14. Fee Column was showing duplicate/wrong value.
15. New Feature. It is now possible to print finalized invoices in a batch mode from the Billing > History tab.

Calendar:

16. Security was not getting applied properly. User were able to move events to another day by dragging/dropping even though security was set not to allow this.



Contact:

17. When you delete an invoice under the Invoices tab, instead of filters at the top, Billing Client screen is displayed.
18. When we click on the Find icon, the Invoices and Transactions tab disappears.
19. When viewing the Detail screen for an invoice, the done button was not functional.
20. Issue in new Contacts address tabs. Create a new contact; before saving it, if I delete the address tab, both the address tabs get deleted and also on save, a crash is observed.
21. Name editing is limited to 10 characters.

Project:

22. Project Performance charts include expenses.
23. Job codes do not maintain hierarchy.
24. Logs Tab: No by default recent log entries will display first followed by the older ones.
25. Slips Tab: Task and Description will be displayed as one column in the bottom grid.
26. On duplicating project its tasks were not duplicating properly.
27. The Print Statement link on the Invoices screen would appear blank if the project was not currently set to "Active".
28. When you initially go to the Projects > Billing > Invoices screen, the initial order of the list was backwards--showing oldest first instead of newest first.
29. In Projects>Slips screen, Additional Services hours were showing up in the Hours > Actual column. This has been fixed.
30. Additional Services time is not appearing in the billing summary: In Projects >



Billing > Summary screen, Additional Services slips do not seem to ever show up in the Additional Services bottom section, in the Actual Hours column. This is fixed.

31. Projects>Invoice: On the Invoice Details screen is a clickable link which shows you the expense slips on that invoice. This link was not working.

Document:

32. The document RTF Replacement field <<SequenceNo>> was not populating sequential number.

33. Auto saved document issue: If documents that are saved automatically within a folder are deleted with filters on, they do not disappear from the grid. The grid was not getting refreshed.

34. Searching a document by using a Create Date and Date Modified as search criteria is not working.

35. Preferences-Project-Misc.: Custom Label was not appearing in the Document Template.

Preferences:

36. Document Templates is missing the color scheme.

37. Drawing status: It was possible to delete a Drawing Status from Preferences even if it was currently in use.

38. System>Defaults: Country list is getting distorted.

39. Project > Teams, when we click on Add, new row is inserted anywhere in the grid.

40. Logo does not load in Preferences.

41. Billing>Billing Codes: Price or Cost Rate values were rounding instead of accepting the normal values.

42. Users> Defaults: The Time/Expense screen was not handling German currency correctly.



Search:

- 43. Under Document Search Request, "File extension" field was not working.
- 44. Under Document Search Request, "Search by Contact" was not working.
- 45. Submittal Search Description is mapped incorrectly.

Time and Expense:

- 46. Time Search returned incorrect or incomplete record sets, depending on who happened to be logged in at the time.
- 47. Slip Descriptions on invoices are broken.
- 48. Expense screen will not show any data if you select any week other than this week on international date format.

Reports:

- 49. The term "Quick View" was retired, so the Employee Quick View report as well as the Quick View screens are all renamed to Performance, Employee Performance report, Project Performance screen and Employee Performance screen.
- 50. Now Budget vs. Actual report includes additional services.
- 51. There was a minor overlap issue with the Email List report.
- 52. Expense Card report has issue with respect to Print.
- 53. Bill Statement report is not counting retainer payments.
- 54. Project List report is unordered.
- 55. Aging report shows incorrect detail if we pay multiple invoices in one payment and if we have over payment.
- 56. Accounts Receivable 8 Steps and Accounts Receivable Detail reports have issue with respect to payments.



57. Profitability Accrued report has no additional services.

58. Project Performance charts include expenses.

EngineerOffice 2013 Release Notes

Version: 13.0.39.0

Release Date: July-05-2013

FIXED ITEMS:

59. If we make several time/expense entries for a project and bill them without finalizing the draft, if we delete the draft later, we notice that the time/expense entries made for the project still remain in the ***draft*** mode. Because of this we cannot update/change the project for those entries.

60. If we edit an expense entry (not in Detail view) and change its date, that change is not reflected. Rather once expense entry is done, nothing can be edited.

61. Adjustment by percentage (%) or dollar amount (\$) on invoices in Billing screen is not working.

62. Dates are formatted incorrectly in the Task list.

63. Slip Descriptions on invoices are broken.