



# Studio360 powered by Smartware Studio<sup>™</sup>

**Release** Notes

Release 6.0.549 November 2024



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# **Release 6.0.549**

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#### **Core Module**

- You can now add custom menu items to the Studio interface to open template documents, create emails, open web sites, and start programs.
  - Create a file in the *Custom Templates* folder called *Custom Menus.xml*. This will have a list of the menu items to add.
    - This is generally C:\ProgramData\Smartware Studio\Custom Templates
    - There can also be User Custom Menus.xml (for user-specific additions) and Enterprise Custom Menus.xml (for enterprise level menus).
  - The file has an initial <MenuCommands> tag, followed by one or more <MenuCommand> sections. Here is an example

```
<MenuCommands>
 <MenuCommand>
    <MenuPath>$MAIN/Our Tools</MenuPath>
    <Description>Smartware Technologies</Description>
    <Action>OpenLink</Action>
    <Url>www.smartwaretech.com</Url>
  </MenuCommand>
  <MenuCommand>
   <MenuPath>$MAIN/Our Tools/Documents</MenuPath>
    <SeparatorBefore>True</SeparatorBefore>
    <Description>New Letterhead</Description>
    <Action>OpenFile</Action>
    <FileName>N:\Form Letters\Letterhead.dotx</FileName>
  </MenuCommand>
  <MenuCommand>
    <MenuPath>$MAIN/Our Tools</MenuPath>
    <Description>Sample Email</Description>
    <Action>CreateEmail</Action>
    <FileName>Sample Email.email</FileName>
  </MenuCommand>
  <MenuCommand>
    <MenuPath>$MAIN/Our Tools</MenuPath>
    <AddSeparator>True</AddSeparator>
 </MenuCommand>
 <MenuCommand>
    <MenuPath>$MAIN/Our Tools</MenuPath>
    <Description>Run Excel</Description>
    <Action>RunProgram</Action>
    <FileName>Excel.exe</FileName>
  </MenuCommand>
</MenuCommands>
```

- The *Menu Path* describes where the menu is located.
  - It must begin with either *\$MAIN* or *\$Tools*.
    - Menus with *\$MAIN* are added to the main menu bar, after the Studio TOOLS menu.
    - Menus with *\$Tools* are added as menu items in the Studio TOOLS menu.
  - You can add additional levels to the menu by separating them with a slash.
- The *Description* property is the text of the menu item itself.
- You can specify <AddSeparator>True</AddSeparator> to add a separator.
- The Action can be
  - *OpenLink* opens the link specified in <Url> in the default browser.
  - *OpenFile* opens the file specified in <FileName>. For Excel and Word templates, you will want to save the files as .dotx or xltx files.
    - The file should be stored in the *Custom Templates* or *Custom Templates/Custom Menus* folder, or else a full path should be specified.
  - *CreateEmail* creates a template from the email template file specified in <FileName>.
    - See the *Reporting Guide* for details about the .email report format.
    - The file should be stored in the *Custom Templates* or *Custom Templates/Custom Menus* folder, or else a full path should be specified.
  - RunProgram starts the program specified in <FileName>
    - Many programs can be run with just the executable name, but you can put the full path if necessary.
- There is a new menu item to VIEW→NEWSFEED IN BROWSER for cases where the Newsfeed isn't currently shown (e.g. a project is open).
- The *Files* tab can now show additional information.
  - There are new columns for *Uploaded By* and *Signature Status*.
  - You can control which columns are shown with the VIEW  $\rightarrow$  FILES TAB COLUMNS menu commands.
- You can now run the Signature Report (already available from TOOLS→REPORTS→ SIGNATURE REPORT) as part of a Submittal Reports node.
  - In the PROJECT list, select (Other Reports) and check Signatures .
- You can sign and track signatures on files from the Submittal Files node.
  - You can right-click on a referenced file in the list and select SIGN FILE. This will apply the signature on the actual file.
  - There is an additional column on the *Submittal Pages* tab that shows the signature status of each file.

- Dragging and dropping email attachments, particularly emails stored as attachments in other emails, has been improved.
- You can now assign group membership for a user for multiple remote servers from a single interface. In the ADMIN->USER AND LICENSES tool, right-click on the user and select CHANGE REMOTE ACCESS. You can control access to both Permission and Management groups.
- In the ADMIN->SERVER CONFIGURATION  $\rightarrow$  SEARCH FILES tool, you can now export the search results to Excel.
  - The search results include the *Uploaded By* column.

#### **Engineering (Estimating and Design)**

- There is a new type of Schedule Template that is designed to create a schedule of all the points in an Area, Control Panel, or Estimate or Design project.
  - Create a Schedule Node under the area-type node that contains the points.
    - The Schedule will synchronize its rows to the list of points in this parent node.
    - You can use the included *Point Schedule* template as a starting point or change *Template Type* of your existing schedule to *Point Schedule*.
  - Columns in a Point Schedule can be linked to the points (and be read-only) or be any other type of custom column (editable). To create a Point Linked column
    - Set the *Data Type* to the appropriate type.
    - Set *Calculation* Type to *Point Record Field*.
    - Set *Point Record Field* to the point property you want to display.
      - The available list depends on the *Data Type* selected.
  - On the Schedule tab, click the new RESYNC POINTS button to scan all the systems in the area and update the point columns.
    - Any points not already on the schedule will be added.
    - Any points in the schedule no longer in the systems will be removed
    - All *Point Record Field* columns will be updated with the latest values
    - Other than with RESYNC POINTS, the point rows and point fields will not update automatically
- There is a new tool for importing Parts and Points into multiple Systems from Excel.
  - Right-click on any type of Area or Estimate node and select IMPORT  $\rightarrow$  IMPORT SYSTEM FROM EXCEL.
  - The tool is similar to IMPORTS  $\rightarrow$  PARTS AND POINTS, but it will also create one or more System nodes.
    - You can also specify a *SystemPath* property to create an Area tree for the Systems.
- The TOOLS → FIND AND REPLACE tool will now scan and replace parts in schedules, including Valve Schedules.
- The Find Controller tool now supports the EasyLogic controllers.

#### Design

- The Find and Replace Parts tool is now available in Design project System Nodes.
  - Right-click on any Area node type and select TOOLS  $\rightarrow$  FIND AND REPLACE PARTS.
- There is an option for the I/O Point Editor to override the default *Common* terminal text of *RET* with a custom value.
  - In the Smartware Studio INI file, add the following setting:

```
[Designer Suite]
CommonTerminalOverride=24C (24C is just an example)
```

#### Management

- There utilities for finding and merging duplicate Company and Contact records.
  - These are available on the MANAGEMENT DATA menu as CONTACT MANAGER→MERGE DUPLICATE COMPANIES and MERGE DUPLICATE CONTACTS.
  - $\circ$   $\,$  To begin, you can select the columns that should be compared
    - e.g., Company *Name* and *Address1* or Contact *FirstName* and *LastName*
  - The tool will show two lists.
    - The top is a list of all records that have potential duplicates
    - The bottom is the potential duplicates for the top'lists selected record.
  - The THRESHOLD setting determines how close a match to consider (0-100).
  - Click MERGE to merge the records.
    - You will be able to see the values for each field for each record and choose the individual values to keep.
- The Change Order record has a number of ways to calculate it's values for *Estimated Cost*, *Estimated Price*, and *Price Approved*.
  - The CALCULATIONS FROM option allows you to control which values are used
    - *Manual* enter the values explicitly
    - Linked Records sum the values from the Change Requests, Field Work Orders, and Subcontractor Change Orders on the Linked Records tab.
    - *Embedded Estimate* use the values from the Embedded estimate (with or without Sales Tax)
    - Linked Records + Embedded Estimate combine the two options
  - There is a new *Price Approved* field in the Embedded Estimate section for use with the *Embedded Estimate* options.
  - The Price Approved can be overridden in most modes by checking OVERRIDE PRICE APPROVED.

- On the Job Add/Edit form
  - $\circ$  There are new tabs:
    - The CHILD FILE SUMMARY tab shows and provides accss to the list of all the files on all the Job's subrecords.
    - The JOB CONTACTS tab shows all the individual contacts referenced in any field of any of the Job's subrecords.
  - On the CONTACTS AND CONTRACTORS tab, if you right-click a row you can now choose to set it to one of the companies already selected for a different row.
    - Each existing option will be in the menu.
  - In a Project Issue, you can now link associated RFIs on the new RFI tab.
- There are new options to make it easir to move data into and out of Embedded Estimates:
  - Data copied from Embedded Estimates shoud remain on the clipboard after your close the estimate, allowing your to copy systems between embedded estimates or other estimate projects.
  - If you right-click on an Estimate and select COPY, you can then right-click on another estimate and select PASTE MODEL AND OVERVIEW PROPERTIES FROM OTHER ESTIMATE.
- Job Cost Tracking
  - There is a new form for JOBS  $\rightarrow$  JCT NOTES ENTERPRISE that allows you to search the Job Cost Tracking notes across jobs in multiples servers.
- There are new forms:
  - JOBS → JCT NOTES ENTERPRISE allows you to search the Job Cost Tracking notes across jobs in multiples servers.
  - JOBS→ENTERPRISE JOB LIST
  - JOBS → JOB TRACKING DATES
- E-mail Routing to Management Records
  - If the Windows Service and the Email Forwarding sub-service have been configured, you can now create rules for routing emails sent to "generic" email addresses to specific records.
    - Note: These settings need to be configured by your IT administrator.
    - The settings are on ADMIN $\rightarrow$ WINDOWS SERVICE $\rightarrow$ GENERIC MAILBOXES
    - For a Generic Mailbox Routing Rule:
      - *Alias* is the portion of the email address to the left of the domain (e.g., 'pos' in <u>pos@acme.studio.com</u>).
      - *Table* is the name of the Management Data tab to forward the emails to (e.g. PoHeaders)
      - *Column* is the name of the column in the table to use to match the pattern (e.g., PoNumber)
      - *Pattern* is a regular expression to apply to the Subject of the email to find a matching value for Column (e.g., PO\d{9}).

#### **Prometheus**

- There are many updates to the Scheider Electric standard systems.
  - Review the TOOLS  $\rightarrow$  PROMETHEUS  $\rightarrow$  PROMETHEUS DASHBOARD for more details.
- For Developers. there is a new set of Reports for helping to review and manage your Prometheus systems.
  - From the Prometheus Developer System Catalog, click the new REPORTS button on the bottom of the form.
  - $\circ$  There are three main data sources Systems, Parts, and Points and template reports for each.
  - Refer to the *Reporting Guide* on the HELP menu for more details on creating and customizing report templates.

# **Release 6.0.548**

June 14, 2024

#### **Core Module**

- There is a new *Software Module Guide* available on the HELP menu, detailing the new EBO-related features of the Software Module.
  - See also the section on *Software Module* later in these notes.
- There are new options for automatically starting different parts of Studio when it is launched.
  - In TOOLS→OPTIONS/WORKSTATION, the SHOW ON STARTUP setting includes *Open Project List*, but also Management forms including *Job List*, *JCT Enterprise*, *Quote List*, *Opportunity List*, and *Service Agreement List*.
- There are new utilities available for files on a *Files* tab:
  - You can quickly merge PDF files together. Multi-select the files and then rightclick $\rightarrow$ SEND TO $\rightarrow$ MERGED PDF FILE.
  - You can split up a PDF file into individual files with one page per file. Rightclick and select SEND TO $\rightarrow$ SPLIT PDF FILE.
  - You can convert a Visio .vsd file into a .vsdm file (as used by the Designer module). Right-click and select SEND TO→VISIO .vsDM FILE.
    - Visio must be installed on the machine to convert the file.
- You can double-click an email on the *Emails* tab to open it in Outlook (or other default mail client).
- There's a new option when doing a Remote Login for downloading and using the resources (i.e., reports and templates) from the remote server.
  - There is a new column of checkboxes to select *Use Remote Resources* for each individual remote server.
  - The resources are downloaded by the Studio Background Updater. You can force the update at any time by selecting TOOLS->CHECK FOR UPDATES.
- To help manage large Estimate and Design projects involving multiple users, there is now a facility for having different users check out different parts of the same project at the same time.
  - The user that has the project checked out can select an engineering node (System, Area, System Group, Control Panel, or Network Location) and select TOOLS→CHECK OUT PROJECT SEGMENT.
  - A new local project will be created that includes the root Estimate or Design node, any nodes directly between the root and the selected node, and all nodes under the selected node.
    - In the original project, the selected node and everything below it will be marked [CHECKED OUT] and locked from editing.
    - In the new project, you can only edit the selected node and the ones below.

- You can upload the new project to the server to allow someone else to edit it. That project can be checked out and in like any other project.
- Multiple non-overlapping segments can be extracted at the time same time.
- The extracted portion will eventually be merged back into the main project.
  - From the node marked [CHECKED OUT] in the main project, right-click and select TOOLS→CHECK IN PROJECT SEGMENT.
  - If the extracted project was added to the server, it will need to be checked into the server first.
  - To undo the check out and ignore any changes made to the extracted project, right-click and select TOOLS→UNDO PROJECT SEGMENT CHECKOUT.
- The are new features in the Open Project List.
  - There is a new check box in the *Server Projects* section to SHOW OTHER COLUMNS. This will show:
    - *Project Description* The *Description* specified on the *Properties* tab of the root node in the project.
    - *Child Job/Quote #s* A list of the *Quote Number* and *Job Number* properties of any Estimate or Job nodes in the project.
    - *Last Opened By* and *Last Opened Date* The name and date of the last time any user opened the project.
    - *Last Uploaded By* and *Last Uploaded Date* The name and date of the last time any user uploaded data to or checked in the project.
  - If you view the other columns they will also be included in the Search.
    - This is very useful for locating embedded Estimates or Jobs by Quote or Job Number.
- There are updates to the Email Forwarding service in the Studio Windows Service
  - It is now possible to have the incoming emails be sent to a Microsoft365 (aka Exchange Online) mailbox that is scanned by a utility program that extracts the email into the drop folder. This replaces the need for an incoming SMTP server.
    - For more information, please contact our technical support team.
  - If needed, you can define a second domain name for the incoming email.
    - This should only be needed if a company's main domain name is changed after the service has been used for a while.
- Administrators can add granular control of access to parts in the parts browser.
  - Go the Parts Database Manager (ADMIN $\rightarrow$ PARTS DATABASE) and select DATA TABLES $\rightarrow$ PARTS.
  - Select one or more parts, right-click, and select LOCK TO EMPLOYEE GROUP. Select the employee group. The parts will only be visible to people who are in that employee group.
    - Each part can only be associated with one employee group.

• Employee Groups are created and managed from ADMIN $\rightarrow$ USERS AND LICENSES.

#### **Network Tree**

- There is enhanced support for IP-based networks BACnet IP devices and ethernet routers on the Network View and in the Automation Overview tool
  - The Ethernet Device object has expanded options on its *Ports* tab. If the SEPARATE BUS FOR EACH PORT option is selected, the table of Ports allows for additional properties:
    - If *Loopback to Device* and *Loopback to Port* # are selected, it indicates that the end of the chain of devices on the port that it loops back to the specified port.
      - The other port will be grayed out in the Ports table, the corresponding bus for the port on the Ethernet Device in the Network View will indicate the Loopback, and devices will not be allowed to be added to that bus.
      - The Automation Overview tool will use this information when drawing bus lines.
    - There is a column to indicate the amount of power available to the port as Power over Ethernet (*PoE Watts*).
    - The *Rows of Ports* option (1 or 2) indicates how the ethernet device will be represented in the Automation Overview diagram.
  - When generating the Automation Overview, there are new options on the *Special Rules* tab.
    - If you check ETHERNET ROUTER, it will show the router and each chain of devices from its ports, including loopback.
    - There is an option to show either the router or the device buses vertically.
    - There is an option for use with an ECOSTRUXURE AS WITH I/O MODULES. If selected, these devices will be shown adjacent to each other without spacing, representing how they are mounted physically.

#### Schedules

- There is new support for child schedules (especially Valve Schedules) for a System.
  - If a schedule is placed under a System node, the system node will have a tab that shows the schedule data (e.g. *Valves*).
    - This allows you to edit the data (or other schedule properties in the schedule's template) without having to select a different node.
    - Any parts on the schedule will automatically be carried onto the Material tab of the system node as locked parts.
    - If there is a System column in the schedule, it will be hidden in this mode.

- You can have multiple types of schedules under the same System.
  - Each will get its own tab for its data.
- You can show a *Schedule Rollup Tab* that aggregates the rows from multiple schedules.
  - Right-click on any Area-type of Engineering node (*Area, Control Panel, System Group, Network Location*) or the *Estimate* or *Design* node and select TOOLS→CONFIGURE SCHEDULE ROLLUP TABS.
  - Select one or more templates from the list. For each one a new tab will be shown with all the rows from all the schedules of that type under the Area.
    - If you choose the SHOW ALL TEMPLATES option, a list of all the schedule template types will be shown to choose from. This is useful if you're creating a template or library that wants a specific rollup but may not currently have an instance below it.
  - If you select the APPLY THIS SETTING TO CHILD NODES then any other area nodes beneath the select node will get the same rollup settings.
  - On a rollup tab you can right-click for navigation options, INCLUDING EDIT IN SCHEDULE, which selects the schedule and row, or EDIT IN VALVE SELECTOR (for Valve Schedules).
- There is now support for Column Views in Schedules
  - Column Views allow users or administrators to create new views of the data, selecting specific columns in a specific order, as well as adding filters or aggregate values.
    - Refer to the earlier section on *Column Views* in Management forms earlier in this document in the notes for Release 5.1.544/
  - Column Views can be directly stored in a Schedule Template.
    - When editing the Schedule Template, there is a button for EDIT COLUMN VIEWS.
    - These views are embedded in the template, so are automatically available to anyone using the template or a schedule based on it, along with any others created for the schedule.
  - For schedules, a column view can also define a *Row Filter* expression that shows or hides rows based on the row's values.
    - For example, a Valve Schedule can contain a column view called Water. Its Row Filter expression could be *ValveApplication = 'Water' OR ValveApplication = ''*, which shows the row it's Water or not yet specified.
    - Schedule column views can also define a DEFAULT REPORT TEMPLATE. When the user clicks the RUN REPORT button on the schedule when that view is selected, the *Report Template* will automatically be set to this report.
  - The same column views for a schedule template also work on Schedule Rollup Tabs for that template.

- You can define specific templates as *Standard Schedules* for common purposes, such as a Valve Schedule and Damper Schedule.
  - Select ADMIN  $\rightarrow$  LIBRARIES, TEMPLATES, AND STANDARD and go to the *Schedules* tab. For each purpose select a template.
  - When adding a new Schedule node to the project using the Toolbox or ADD menu, there will be new, additional items, for *Valve Schedule* and *Damper Schedule*.
  - When adding a new System node to the project using the Toolbox or ADD menu, there will be new, additional items, such as *System with Valve Schedule* and *System with Damper Schedule*.

#### Reporting

- When using the option to *Generate Reports Individually*, there is a new option to prevent it from breaking apart a multi-sheet report or report group.
  - For a single report, create a report group (.xml) file that references the report.
  - In the Report Group's .xml file, in the *ReportGroup* element, add the *KeepReportsInGroupTogether* attribute as shown:

```
<ReportGroup KeepReportsInGroupTogether=True>
<Report>Controller Checkout 2.xlsx</Report>
</ReportGroup>
```

- When creating reports from the right-click NEW menu using the *Custom Templates.xml* feature, you can now differentiate based on the type of Estimate being selected.
  - The *OnlyAllowOnNodeTypes* option can now be *Estimate*, *Estimate\_Standard*, *Estimate\_Simple*, and/or *Estimate\_Service*.
  - *Estimate* means all estimate types (as it did before).
  - Multiple options can be listed and separated with commas

#### **Submittal Generator**

- On a Submittal Files node there are new actions for the files:
  - For files that are stored on a different node, you can right-click and select GO TO FOLDER. Studio will navigate to the source folder.
  - For server projects you can right-click on the file and select SIGN FILE.
    - This signs the file within Studio only, adding a comment and making it read only. This is not an electronic signature, such as the kind used in PDFs or DocuSign.

- For the Submittal Reports node, there are new options for additional reports.
  - In the Project drop down, select (Other Reports).
  - You can select the *Signature* report for the project (available already from TOOLS $\rightarrow$ REPORTS $\rightarrow$ SIGNATURE REPORT).
  - You can reference a custom report by adding the template to the node's *Files* tab. It will then appear in the list of reports.
- For the Submittal Schedule Reports node, you can now run the report for a single schedule or an Area showing the Schedule Rollup tab.
  - Select the *Schedule or Node, Schedule Template*, and *Report* properties separately.

#### **Estimating Module**

- There is a new tool for building an Engineering Tree from a Spreadsheet Import
  - Refer to the item later in these notes under the Designer Module section.
- Material
  - Custom parts (those not in the database) in a System's parts list will be marked with a graphic 'c' where the 'a' for accessories would be for other parts.
- Labor
  - There is a new option for calculating *Hours from PM*. Currently these hours are considered as already Adjusted Hours and are not subject to Global Labor Adjustments or Repetition Curves. This can now be changed to calculate them as Regular Hours and then apply all the adjustments,
    - In the Estimate Settings, on the Labor / Other Labor Options tab, check CALCULATE 'HOURS FROM PM' AS UNADJUSTED HOURS.
  - There is a new report for use with Labor Transfer Rules. The *Labor Totals with Labor Transfers* report shows a breakdown of the labor costs before with and without the Labor Transfer rules applied. This provides a breakdown of the savings.
  - There is a new option for calculating Subcontracted Labor for a system. Currently the unadjusted hours are used in estimating the subcontract. With the new option, the adjusted hours are used instead.
    - In the Estimate Settings, on the Subcontracts / Labor and Material tab, check USE OVERRIDING GLOBAL LABOR ADJUSTMENTS IN SYSTEMS WHEN CALCULATING ESTIMATE SUBCONTRACTS.
- Subcontracts
  - There is a new option to specify a Default Custom Markup for subcontracts as part of the Estimate Model.
    - In the Estimate Settings, on the *Subcontract / Markup and Codes* tab, check USE DEFAULT CUSTOM MARKUP and specify the value.

- Expenses
  - In a Simple Estimate you can now add additional costs for Risk, Warranty, Bonds, Service Agreement, Overhead, and G & A.
    - These values are on the *Expenses / Allowances* tab.
- Reports and Data Sources
  - There is a new Estimate Group Summary report for use with Estimate Groups.
  - In the *Reports / Allocate Costs to Systems* tool, the estimated cost of subcontracted material and labor will now be distributed to the associated system.
  - There is a new data source, *MergedSystemItems*, that merges itemized material, labor, points, and subcontracts together so they can be run as a single Data by System report.
    - The new *System Items by Area* report uses this data source.
- Service Estimates
  - There is a new option for how Labor hours should be distributed to Task Codes.
    - In Estimate Settings, on the *Service Estimate* tab, there is a new *Labor Code* OPTION.
    - The default option has one labor code each for *Task*, *Repair*, and *Remote Support* hours.
    - The *Use Sub-Codes* option allows for each of the categories to also specify a sub-code, when applicable.
    - The *Two Task Labor Codes* option allows for two labor codes for Task Labor, with each having a specified percentage.
- Risk Register
  - There is a new Estimate tab, *Risk Register*, where you can log any risks that may be foreseen for the estimate
    - Schneider North America users will see this automatically. Other users can show it by editing the *Smartware Studio.ini* file (from HELP→ABOUT, press CTRL+ALT+SHIFT+I) and adding the following entry:

```
[Estimating]
ShowEstimateRiskRegister=True
```

• You can customize the values shown for the *Category* field by adding them to the Smartware Studio.ini (or Site.ini) file:

```
[Estimating]
RiskRegisterCategories=Labor;Materials;Subcontract;Co
mmercial;Miscellaneous
```

#### **Designer Module**

- There is additional support for and performance gains when using the .vsdm format for Designer Drawings.
  - Scanning a closed .vsdm drawing is much faster than .vsd, as it's done without launching Visio itself.
    - While the .vsd format will continue to be supported with its current functionality, future Designer features may require the new format to be used.
  - You can convert a Visio .vsd file into a .vsdm file using right-click and select SEND TO→VISIO .vsDM FILE.
  - The default Blank Drawing file and other templates have been upgraded to .vsdm.
    - If you have your own versions, you are encouraged to upgrade them explicitly (in Visio, use FILE→SAVE As and select the .vsdm file type). You will need to also update the settings in ADMIN→LIBRARIES, TEMPLATES, AND STANDARDS on the *Template Files* tab.
  - There is a utility to convert all the .vsd Designer Drawings on the entire server to the .vsdm.
    - In ADMIN→ENTERPRISE MANAGEMENT AND REPORTS, on the *Server Utilities* tab, select the server and click UPGRADE VSDS TO VSDMS.
    - The files will be upgraded and renamed. The original .vsd version can be accessed as a Previous Version of the file (right-click the file and select PREVIOUS VERSIONS).
    - To limit the tool to just one or a few projects, enter a comma-separated list of Project IDs in the PROJECT IDs text box.
- There is a new tool for building an Engineering Tree from a Spreadsheet Import
  - Right-click on an Estimate, Design, or any engineering Area node (including Control Panel, System Group, and Network Location) and select IMPORT→IMPORT NODES FROM EXCEL.
  - You can generate a template that shows the format for the import by clicking the GENERATE IMPORT TEMPLATE button.
    - The import file is stored on the Files tab of the node.
    - Each row of the import sheet is a new node to create in the tree below the selected node.
    - The format consists of three columns:
      - *ParentNode* leave blank to create the new node directly under the selected node. Otherwise, it should be the name of another node already created in the import.
      - *NodeName* the name of the new node to create
      - *NodeType* the type of node to create, such as Area, System or Control Panel. The template workbook has a drop-down selection for this column.

- Click the VERIFY button to validate the data in the import. Once any issues are resolved, click the IMPORT button to create the new nodes.
- BOM Shape
  - There is a new option to sort the parts by part number, even when showing BOM Tags.
  - The BOM Shape has more options for handling BOM Tags with a larger number of characters.
    - There is a new option to Split Long BOM Tags.
    - The normal behavior is having this option turned on.
    - If you turn it off, the BOM shape itself will get wider as needed.
- Revision Notes
  - There is a new report, Revision Bubble Report, which lists each Designer drawing page and whether they have any Revision Bubble shapes.
    - This is useful in reviewing and committing revisions as well as locating and removing the bubble shapes.
- Designer Shapes
  - There are shapes for the EasyLogic BACnet MS/TP controllers
    - The EasyLogic MP-C-24A and MP-C-36A have their own shapes in the SE SmartStruxure stencil. The EasyLogic RP-V and RP-C versions are compatible with the existing shapes.
  - There are enhancements to the LSP Board and Security Device shapes.
  - There is a new JACE 9000 controller shape in the Tridium stencil for Visio and the Network Tree.
  - There is a new Visio shape and Network Tree device for the RS-485 adapter (the one used to integrate the BACnet IP controllers onto an existing MS/TP bus).

#### **Prometheus Module**

- The Prometheus Dashboard has been updated with additional information.
- For Prometheus Developers
  - In Parts, when specifying a custom part category, there is a new property for *Extended Properties*. This is a formula that resolves to a string. That string is a list of the extended properties for the part, in the standard parameter list format (e.g. *Property1=value; Property2=value*). When the user selects the Select Part option, the part browser will automatically be filtered (and frozen) to these property values.
- There are many additions to the Lua Libraries, including a library for creating Function Block programs programmatically and from scratch.
  - Refer to the Lua Library Reference on the Help menu for more details.

#### **Management Module**

- General
  - Many of the records available on the Job's *Project Management* tab (e.g., Change Orders, Subcontracts, etc.) are now available as separate lists of the records for all jobs.
    - For example, you can view all the Change orders from MANAGEMENT DATA→PROJECT MANAGEMENT→CHANGE AND SCOPE MANAGEMENT→CHANGE ORDERS.
  - The *Files* Tab in records now has a SEARCH box.
  - The *Column View* feature allows you to specify a custom display name for each column.
  - There are more forms that allow for records to be deleted with a DELETE button beneath the data grid.
    - There is a new explicit Management permission for allowing the user to *Delete Subrecords*. When sub-records are being deleted, there are detailed listings in the confirmation messages.
- Asset Tracker
  - There is a new Asset Tracker, designed for tracking physical assets such as tools, furniture, and small equipment.
    - This is a separate application in the Management Module, so users will need to be give permission to view these forms in the Management Data menu.
  - You can create Asset Locations, Assets, and transfers of assets from one person to another.
- Change Management
  - When viewing the Change Requests within a Job, you can right-click and select DUPLICATE CHANGE REQUEST. This creates a new Change Request, copies over and fills in certain fields, and opens the request for editing.
  - The Change Order has additional ways to bring in the *Cost and Price*
  - from the other records (Change Requests, Field Work Orders, and Subcontract Change Orders).
    - The *Calculations from* selection allows to select between manual values, the linked records, and various configurations of the Embedded Estimates.
  - There are additional reporting data sources, including tables with the embedded estimate data from the linked records.
- Embedded Estimates
  - When working with a Job Project's *Management Data* and opening an Embedded Estimate from a child record (e.g., a Change Order), the project properties from the Job node's *Properties* tab will be available as OVERRIDE values to select in the Embedded Estimate.
  - Studio will now remember information on the clipboard after the project is closed, allowing you to more easily copy nodes into or out of an embedded estimate,

- To help facilitate populating the model of an Embedded Estimate to match an existing estimate, you can now copy the Estimate Model and Overview Properties from one estimate to another using the clipboard.
  - Right-click and select the estimate to copy from.
  - Right-click the target estimate and select TOOLS→PAST MODEL AND OVERVIEW PROPERTIES FROM OTHER ESTIMATE.
- In the rare case where new data points start being captured from an estimate to the company database, there is a tool for forcing all embedded estimates to be recalculated and reached.
  - This is only needed if the new data points from linked embedded estimates are being used in a Change Order.
  - The utility is in Admin→Enterprise Management and Reports on the Server Utilities tab. Click the UPDATE EMBEDDED ESTIMATE CACHE DATA button.
- Material Management
  - A Bill of Material can now have Outgoing Material Transmittals.
    - These are groupings of parts being sent to a job site or other location. The report of these becomes a packing slip.
    - Similar to creating a Purchase Order, select one or more parts in the BOM Items list, right-click, and choose Mark Selected Items as Sent Out. This creates a new Outgoing Material Transmittal with the parts.
      - You can adjust the quantity as needed if not all of the items in a line item are being sent.
      - You can also select additional parts to add to a transmittal and choose MARK SELECTED ITEMS AS SENT OUT TO <SENT TO> ON <SENT DATE>.
      - Items are also shown grouped by Part Number.
    - All the Outgoing Material Transmittals for a job are also shown on a new sub-tab of *Material Management*.
  - There is a new data source, *MoItemsByPartNumberAndVendor*, that groups the parts by part number regardless of price (for ordering and generating a material listing).
  - You can check a Bill of Material to see if any of the prices have changed in the database.
    - On the BOM Items tab, click CHECK FOR PRICE UPDATES.
    - A line-by-line comparison of all the differences in *List Price* and *Net Cost* will be shown.
    - Click UPDATE to accept the changes or CANCEL to ignore.
  - In the lists of Purchase Orders, you can right-click on a PO and select OPEN PARENT BOM to get to the parent record.
  - In the Bill of Material there is a new filter for *System* name on the *BOM Items* tab.

- In a Purchase Order there are now additional ways to specify the *Ship To* address.
  - These include Office, Company, Contact, Job Site, or Custom.
- Subcontracts
  - There are a number of additional fields in the Subcontract Record, including Liquidated Damages and Retainage percentages
- Employees
  - Employees can now update their individual contact information in the Employees table, such as phone number
    - They can go to MANAGEMENT DATA→CONTACT MANAGEMENT→EDIT MY CONTACT INFO.
    - Most other employee fields are neither visible nor editable from this view.

#### Software Module

- The Software Module has been enhanced with new tools.
  - These tools are now accessible from the TOOLS  $\rightarrow$  SOFTWARE TOOLS menu.
  - The *Software Module Guide* is available on the HELP menu and contains full details.
- The tools include:
  - EcoStruxure Auto-Bind Tool
  - Function Block Library System, Toolbox, and Updating Tool
  - Function Block libraries for WorkPlace Tech and Microzone II functionality.
  - WorkPlace Tech File Comparison Tool.

# **Release 5.2.547**

September 11, 2023

#### **Core Module**

- There is a new utility for quickly merging or splitting PDF files on a *Files* tab.
  - To split up a PDF file into individual files, right-click on the file and select SEND TO→SPLIT PDF FILES.
  - To merge two or more PDF files into a new file, multi-select the files, right-click, and select SEND TO $\rightarrow$  MERGE PDF FILES.
    - The files will be merged in the order they currently appear in the file list.
- Reverting a server project to a previous version has required the user be a Studio administrator. Now any user that is allowed to check out the project can also revert it to a previous version.

- When using the Submittal Generator's Part Information PDFs node, you can now reorder multiple PDFs as a group.
  - Multi-select the files list in the list
  - Use the up and down arrows to move the entire set above or below the adjacent file
  - If the files you selected are not a single block, they will become one with the first move.
- The Smartware Expression Language, used with a number of features including Reports and the Schedule Builder, has new functions:
  - These include: CurrencySymbol, GetDay, GetMonth, XCommaY
  - Refer to the updated *Expression Language Reference* guide available on the HELP menu
- On the *Emails* tab, you can now double-click the email to open it in your default email viewer.
- There are some updates to the ADMIN $\rightarrow$ USERS AND LICENSES tools
  - There is a tab that shows your license modules.
    - *Modules* are the individual elements that are purchased and renewed. They include Core, Estimating, Designer, Management, Prometheus, Prometheus Developer.
    - Modules are assigned to *License Accounts*. Every license requires a Core Module, but the others can be moved between users.
      - This feature is now available to all administrators.
  - For enterprise configurations, the ADMIN→FIND USER tool can located users amongst servers
    - You can open the user's server's configuration from the search results.
- There are two updates to Enterprise Management
  - You can now create an *Enterprise Studio.ini* file to complement the *Site.ini* (Company level) and *Smartware Studio.ini* (User level) files.
    - This can be used to globally set a value that would normally be in *Smartware Studio.ini*.
      - Note that any setting in the user's file will override the Site or Enterprise setting.
    - The file should be stored in the Enterprise Distribution folder in the *System Config* subfolder
  - In ADMIN→ENTERPRISE MANAGEMENT AND REPORTS there are new Data Sources related to Service Estimates: ServiceEstimateStatistics, EstEquipment and ServiceEquipmentEx.
- Ghostscript is no longer required to make PDFs from Office files.

#### **Estimating Module**

- There is a new tool for managing multiple Estimate Model Template files for your organization.
  - To begin, create a new Customer Site or Library project and add an Estimate node for each different Estimate Model you have and select the associated model with each These will be the master versions of the templates where you will apply changes such as labor rate updates.
  - The new tools for managing the Estimate Model Templates for a project structured like this can be accessed from TOOLS→LIBRARIES→MANAGE ESTIMATE MODELS.
    - There are four separate tools in this utility.
  - You can treat one estimate as the source, make changes to that one, and then push the changes to the others.
    - Select the *Source Estimate* and check the *Destination Estimates* you want to copy to.
    - Click IMPORT PROPERTIES
    - You will be prompted to select which sets of model properties you want to copy.
    - This is essentially the same as using the *Import Estimate Model* features on each destination.
  - You can update the value of a single property in one or more estimate models.
    - Select the *Destination Estimates*, *Property*, and *Value*.
    - Click APPLY.
  - You can create a script of commands for exporting, renaming, and distributing the estimate models templates.
    - Click EDIT EXPORT COMMANDS to edit a text file that describes how the rules for each estimate.
      - A detailed explanation of the rules will be shown.
      - You can choose to save the models locally or to your company's server for distribution to all users.
      - For enterprise configurations, you can also choose which servers to copy to.
      - You will need to have the proper privileges on the company or enterprise server to export to those folders.
    - Click EXPORT MODELS to do the exports and copying.
  - For updating labor rates in multiple models, it may be useful to create a spreadsheet with just the rates that can then be imported.
    - The spreadsheet contains a table of the estimate models (as rows) and the labor rates (cost and sell) per labor code as columns.
    - The worksheet tab must be named 'Model Import'

- The first column must be named 'Model Name'. The values should match the name of the Estimates in the project.
- There should then be two columns for each labor code. For the labor code 'PM', there should be columns named 'PM Cost Rate' and 'PM Sell Rate'
- Click the IMPORT LABOR RATES FROM SPREADSHEET button to select the spreadsheet and make the updates.
- When viewing Cost Escalations for Material or Labor, there is a new option to show the calculated amounts per period as the *Escalated Cost* or the *Amount of Escalation*.
  - For example, if 50% of a \$25,000 cost (\$12,500) in Period 2 has an escalation rate of 1.05, the *Escalated Cost* is \$13,125 and the *Amount of Escalation* is \$625.
  - There is a new Data Source showing the breakdown of *MaterialCostEscalations*.
- Custom parts on a System tab are now flagged with a 'c' icon (where other parts are marked with an 'a' if they have accessories).
- Risk can now be calculated in two different ways
  - By default, Risk is calculated using the *Itemized Cost* as a base for percentages and makes Risk part of *Direct Cost*.
    - This does not include other costs such as *Cost Escalations*, *Taxes*, Freight, etc.
  - You can now choose *Risk* to be calculated on the *Direct Cost*, and then become part of *Total Cost*.
    - This will generally lead to a higher value for *Risk*.
    - The change is also reflected in its position in the Summary.
  - The option is available in the Estimate Settings on the *Expenses and Allowances/Allowances* tab.
- You can now include *Freight* and most Allowances in a Simple Estimate.
- There are a number of new options related to how markup and margin can be calculated in an estimate. Most of these are available by going to the Estimate Settings.
  - For Labor, there is a new LABOR MARKUP CALCULATION MODE selectable on the *Labor/Other Labor Options* tab of the Estimate Settings.
    - The default is USE MARKUP.
      - This refers to the Estimate's markup rate and any custom markup rates applied to specific labor codes.
    - A new option is USE LABOR SELL RATES.
      - This calculates the labor price based on the hourly *Sell Price* values specifiable on the *Labor Codes* table.
      - No other custom markup can be applied to labor in this mode.
    - You can also specify a FIXED CUSTOM MARKUP for all labor.
      - This is equivalent to setting the same Custom Markup for all labor codes.
  - For Material, there are new options for markup.

- The default is CALCULATE MATERIAL WITH MARKUPS
  - This refers to the Estimate's markup rate and any custom markup rates applied to specific vendors.
  - You can also specify the DEFAULT CUSTOM MARKUP rate for material.
- The new option is CALCULATE USING SELL PRICES.
  - In this case the price of the material uses the *List Price* and effective *Sell Price Multiplier* for each of the parts in the systems.
  - No other custom markup can be applied to material in this mode.
  - You can set the same multiplier for all parts with Use Fixed Sell Price Multiplier.
- Each of these options can be specified separately for parts made and sold by Schneider Electric (IG) and all other parts (OG).
- You can now set a DEFAULT CUSTOM MARKUP percentage for *Subcontracts* and *Itemized Costs*.
- The Estimate Settings *Summary* tab also has new options for controlling the options for markup and margin, including
  - You can now FIX THE MARGIN percentage (where before you could only fix Markup).
  - You can HIDE THE MARKUP BOX completely and/or SET MARKUP TO 0%.
    - These are useful if you've set fixed custom markups for all categories.
- There are additional options for working with subcontracts.
  - In the Estimate Settings, on the *Subcontracts/Labor and Material* tab, there are options for AREA/SYSTEM LABOR TABLE OPTIONS (FOR LABOR AND SUMMARY TABS).
    - The new option shows the subcontracted labor as a separate table, using subcontractor rates, and shows the cost as 'Subcontract Labor'
  - There is a new option to show subcontracted labor broken out separately on the Estimate's *Labor/Total Labor* tab.
  - The Subcontractor Code list can now be reordered.
- Schneider North American branches will now see the *List Price* when browsing parts.
  - This information is for reference only.

#### **Designer Module**

- For the Schedule Shape, there is a new, faster option to refresh the schedule without opening the options form.
  - Simply right-click the shape and select the new REFRESH option.
  - There are new Smart Shapes for the latest Schneider parts, including the *RP-C-16B* and the *Insight Sensor*.

- There is now a tool to ENABLE ALL I/O TERMINAL BLOCKS in Sensor and I/O shapes.
  - The commands are available on the Design360 ribbon in Visio, under the I/O Terminals drop down menu.
  - This effectively sets (or clears) the SHOW TERMINAL BLOCKS checkbox in each of these shapes.
- Data Sources
  - The *ControllerPoints* data source now includes the *SoftwareTag* and *SoftwareTagDescription* fields.

#### **Management Module**

- The *Management Data* tab will now be shown on Estimate Shortcut and Job Shortcut nodes.
  - This allows you to view and edit this data without otherwise opening up the Estimate or Job project.
- On a record's *Files* tab, there is an option to email a Studio link to the record (SEND STUDIO SHORTCUT).
- There is a new tool for helping manage the Companies list to find and resolve potential duplicates.
  - You can access the tool from the MANAGEMENT DATA  $\rightarrow$  CONTACT MANAGEMENT  $\rightarrow$  MERGE DUPLICATE COMPANIES menu command.
  - The tool will show you a list of records that have a potential duplicate in the top list.
  - As you select each one, the possible duplicates are shown in the bottom list.
    - If you click the Merge button, you will be shown the various property values in each. You can then choose which of the differing values to keep in the merged version.
    - The record in the lower list will be deleted after the merge.
  - The adjustable *Threshold* value determines how close a match is needed to be considered a possible duplicate. The higher the number, the closer the match must be.
- There is a new form for managing a list of head-end Controllers (e.g., the EBO AS and Niagara JACE).
  - $\circ$  These records can also be linked and viewed from Job records
- There are new features to the *Bills of Material* (formerly *Material Orders*) and *Purchase Orders* lists. These are available on a Job's *Project Management/Material Management* tab, as well as the MANAGEMENT DATA → ACCOUNTING → BILLS OF MATERIALS menu.
  - There is a new tab that shows BOM Items by Part Number.
    - This groups items with the same Part Number together.
    - You can manipulate them into Purchase Orders from this tab.
  - When working with a Purchase Order, you can mark one or more items as Received.

- On the *PO Items* tab, right-click and use the command to group one or more parts and quantities into a "Received" record.
- The PO Items tab will show the PO Quantity and Quantity Received.
- You can also track the items on a BOM that have been "Sent Out" to the job site or other party.
  - On the *BOM Items* tab, right-click and use the command to group one or more parts and quantities into a "Outgoing Transmittal" record.
  - The Send Out records are separate from items being received.
  - The BOM Items tab will show the quantity on the BOM and Purchase Orders, *Quantity Received* (and remaining to be received), and Sent Out (and *Still to be Sent Out*).
- You can right-click an item on the BOM Items list and select OPEN PARENT PO.
- There is a new property on System and Schedule nodes to *Exclude from BOM Import*.
  - If set (or if the other *Excluded* property is set) the parts on that node will not import into a Bill of Material when using the IMPORT FROM STUDIO PROJECT TREE button.
- The Purchase Order has a new data source called *PoItemsByPartNumber*
- Purchase Orders will be locked and open as read-only if the *Status* is set to *Ordered* or the *Ordered Date* is specified.
- Service Agreements now have a link to an associated Job record.
- There are new features available on many of the lists on the Project Management tabs:
  - Right-click  $\rightarrow$  SEND FOR REVIEW
    - Prepares an email for you to send including a link to the record
  - Right-click  $\rightarrow$  ADD NOTE
    - Allows you to add a note to the record without opening it first
  - Generate New Report Template
    - See the "Reports" section for more detail
- When creating an Outgoing Transmittals for a Submittal, key fields are carried into the new record.
- Administrators can configure an Audit Log to track the change in values.
  - Most fields are not tracked automatically. As this can be a lot of data, you must configure the specific fields in specific tables to be tracked. Contact Smartware Technologies technical support for help in configuring the Audit Log.
  - Administrators can view and search the Audit Log records
    - MANAGEMENT DATA  $\rightarrow$  Admin  $\rightarrow$  Audit Log

#### **Prometheus Module**

• A System node that is configured as a Prometheus system will show in the Estimate or Design tree with a small "fire" icon in the corner.

- When working with a schedule of Prometheus systems
  - You can now import and export individual systems as .PromData files.
    - These files contain the responses and the system information.
    - To export a row, right-click it and select EXPORT PROMETHEUS RESPONSES
      - The .*PromData* file will be saved on the *Files* tab
    - To import an exported file into the schedule, right-click on the empty area of the schedule and select IMPORT PROMETHEUS RESPONSES AS NEW ROW
    - You can also move data between a system node and a schedule row.
      - The system node stores its data in a file called *System.PromData*.
      - You can import that into a compatible schedule or copy the exported schedule row into that file on the system node.
  - The Generate All Documents button will now present a form that lets you select which rows, and which documents you want to generate.
- There are a number of new developer-related features
  - When running Lua script documents, you can choose to run with the Debug Console or Log Window.
    - Debug mode allows you to use Microsoft Visual Studio Code to create breakpoints and otherwise debug the Lua code. Right-click the document in the list and select GENERATE THIS DOCUMENT (DEBUG MODE). You will be given further instructions on how to connect to the debugger.
    - The Log Window displays messages generated explicitly by the Lua script as well as errors in the execution. Right-click the document in the list and select GENERATE THIS DOCUMENT (LOG WINDOW).
  - The Lua Libraries continue to be expanded.
    - For the latest reference, refer to HELP→LUA LIBRARY REFERENCE.
  - The *PartTag* field now allows you to map multiple points to a single part.
    - Previously it was expected that if multiple parts and points referred to each other in more than a one-to-one manner then based on the conditions in the system that all except one variation would be removed.
    - Now if the results are one-to-one the part and point will still reference each other through the *PartTag*. However, if there are multiple matches then the results will show "*N* Points" for the part or "*N* Parts" for the point.
  - There is a new option for creating a list box question designed to "map" labor codes. For example, if you use the ENG labor code and have hours calculated to it, you can create a question that allows these hours to be mapped to a labor code available in the end-user's Estimate.
    - For the *Question Type*, select *List Box*.
    - Check the *Is Labor Code Question* checkbox

- In *Labor Code to Map From*, select a labor code that exists in the Prometheus System. This list is based on the labor codes in your parts database.
- When the system is run, the end-user will get a list of labor codes in their estimate. Any hours meant for the *Labor Code to Map From* will end up in the user-selected labor code.
- Questions can now include more advanced Tool Tip options. Tool Tips are shown as a blue 'question' icon next to the control.
  - When editing the question, go to the *Tooltip Properties* sub-tab.
  - The *Tooltip Text* can now be an expression. This is the text displayed when hovering over the icon or in the pop-up box after clicking the icon.
  - You can also add a web-link that is displayed in the pop-up box.
    - The *Tooltip Link Text* is the text displayed as the link.
    - The *Tooltip Link URL* is the web page to go to when the link is clicked.
- The is a new *Note* question type, which created a fixed multi-line text read-only box text box of information.
- The logic for dealing with the value of a question when hidden or disabled has been updated.
  - Hidden questions will have an empty value
  - Questions hidden and then restored will retain their previous value.
- There are new options for filtering the allowed alternate parts for a Part.
  - If you want to allow a Part to offer the user an option to select an alternative:
    - Check the *Allow Custom Parts* checkbox.
    - Select a *Device Category* to filter to those parts.
    - Optionally include a list of value for the *Extended Properties*. The format is a list of *property=value* elements, separated by semicolons. For example, with *Device Category* set to *Sensor*, *Extended Properties* could be:

Mounting=Ceiling;DisplayType=None

- There is a new option for showing values in a Prometheus Schedule that allows you to show a calculation of any of the Prometheus values from the row in a cell.
  - In the Prometheus section of the Schedule Column in the Schedule Template, select the Update Direction as From Prometheus.
  - The new *Calculation* column will now be available.
    - Where the existing *Property Name* option allows you to show a single value, the Calculation column allows you build an expression using any of the values in the Prometheus system.

- There is a new tool that allows you to create a Prometheus Schedule template from the Prometheus system itself.
  - For the questions you want to include in the template, select a value for the *Schedule Template* property to *To Prometheus*, *From Prometheus*, or *Bidirectional*.
  - In the Prometheus Developer window, select THE TOOLS→GENERATE SCHEDULE TEMPLATE menu command to create the schedule template.

#### **Parts Database**

- When browsing parts the *Keyword Search* and *Part Number* boxes have been merged into a single *Search* box.
- The Part Package management tools have been enhanced.
  - A good way to manage Part Packages is to create an Estimate project with an Area called Company with a System node for each package. This allows you to edit and update the packages using the tools available for Estimates (Update to Database, Find and Replace, etc.).
    - You can now use Area nodes to represent the folder structure of how the part packages are stored and displayed.
  - You can build such a project by creating a blank estimate, right-clicking, and selecting TOOLS→IMPORT ALL PART PACKAGES INTO ESTIMATE.
  - You can publish the systems as packages directly to the server
    - Right-click on the "Company" area and select EXPORT→EXPORT ALL PACKAGES MAKES FOLDERS FROM AREAS.
    - You must be a Parts Database administrator to use this command.
- When using Software Tag Sets
  - There is a new option to hide the ones that are built-in.
    - Go to Tools→Options on *the Parts Database* tab and check HIDE SMARTWARE SOFTWARE TAG SETS
  - Importing and deleting Software Tag Sets is now significantly faster.
- When Parts are added or updated in the Parts Database Manager, the user and timestamp is noted.
  - The *Pz\_Parts* table contains the fields *LastModifiedBy* and *LastModifiedDate*
- When publishing the Parts Database, there is a new option to use the Impersonation account to access the server folder.
  - In the Parts Database Manager go to OPTIONS  $\rightarrow$  OPTIONS.

#### Reports

- You can now auto-generate a report template for many Management reports.
  - For Management forms with a table of data and a selector beneath it for choosing a report template (such as the Jobs form), there are new options for generating a template.

- Choose either
  - GENERATE NEW FILTERED REPORT TEMPLATE
  - GENERATE NEW UNFILTERED REPORT TEMPLATE
- Click RUN and it will create a template with the columns currently shown (based on the selected Column View, if any).
- The report template will be saved in the appropriate folder to customize and run immediately.
- Filtered reports will show the same rows that are currently displayed on the screen, using all selected filters.
- Unfiltered reports will show all the rows in the unfiltered data source, ignoring filter controls on the form.
  - These can be filtered by specific values using the <WHERE> function in the <X> section of the report template. Refer to the Reporting Guide for more information.
- There is a new Enterprise Report data source for Service Estimates.

# **Release 5.2.546**

June 17, 2022

#### **Core Module**

- For Schneider Electric branches, the proxy server settings required to connect to the Smartware licensing server are auto populated and will retry different configurations to better support connections in the office and from remote locations.
- There are now separate options for selecting the Culture and Language options for the *Region* setting found tin TOOLS → OPTIONS.
  - Culture refers to date, number, and currency formats
  - Language refers to translations of the text.

#### **Estimating Module**

- There is a new tool that allows you to create options for transferring hours from one labor code to another with additional calculations. An example of using this would be to have an option to outsource a specific type of labor.
  - To use this feature
    - Go to the ESTIMATE SETTINGS and select the *Labor/Other Labor Options* tab.
    - Click the EDIT LABOR TRANSFER RULES button to edit the rules.
    - Once the rules are correct, check the USE LABOR TRANSFER RULES to active the options.

• An example of a rule looks like this

::Use GRAPH2 for GRAPH GRAPH = -0.8 \* GRAPH GRAPH2 = 1.1 \* GRAPH

- The first line of the rule starts with 1, 2, or 3 colons, followed by a piece of text to show as a checkbox on the Labor Hours tab of a System.
  - One colon indicates the checkbox is shown on Areas and Systems
  - Two colons indicate the checkbox should also be shown on the Estimate node
  - Three colons indicate the checkbox should only be shown on the Estimate node.
- Each line after the first indicates a formula to calculate a new row of labor when the user checks the checkbox. The variables in the formula are the names of the labor codes and represent the total hours for that labor code in the system.
  - For our example, imagine there are 100 hours of GRAPH labor in the system.
  - The first formula calculates the GRAPH hours for the new row to be 0.8 \* GRAPH, which is -80. This will reduce the total GRAPH hours in this system to 20.
  - The second formula calculates the GRAPH2 hours for the new row to be 1.1 \* GRAPH, which is 110.
    - Notice that it does not use its own calculated GRAPH hours in this calculation.
  - The implication here is that GRAPH2 represents outsourced labor that should be at a lower per-hour cost. The 20 hours left to GRAPH would be the overhead of coordinating with the third party.
- You can have up to 3 labor transfer rules in an Estimate.
  - When the user enables the option, the hours will change immediately.
  - Changes made at an Area or Estimate level automatically affect all systems below them.
- The Subcontractors data source now includes a number of new fields
  - o These include Labor Code Description, Estimated Hours, and Estimated Material
  - There is also a new data source, *SubcontractorsAll*, that contains all of the subcontracts even those where *Include* is off.
- A number of Travel Expense values are now stored in the Estimate Model, so can be prespecified in an Estimate Model Template.
  - These include *Distance to Job*, *Average Speed*, *Travel Time*, *Tolls*, *Parking*, *Per Diem*, and *Other* per-Trip cost.

#### **Designer Module**

• There are new stencils for Life Safety shapes

- There is a new shape for the S-MNR2 device
- There are new SE Security Expert shapes

#### **Management Module**

- There is a new utility for helping to keep the Quote, Estimate, and Job names and numbers in sync between Studio Estimate and Job projects and their corresponding Quote and Job Management records.
  - From the TOOLS menu, select SYNC PROJECT NAMES AND NUMBERS
  - It will show a list of the Name and Number fields of all the Quote and Job nodes in the project, along with the corresponding value in the Management record, for cases where the values are not the same.
  - For each there is a quick link to update each value based on the other.
- The *Job* form contains a new tab, *Child File Summary*, that shows a list of all the files in all of the sub-records.
  - If you right-click on a file, you can open the containing sub-record to view and edit the file.
- The *Company* form has new tabs, *Quotes* and *Jobs*, that show a list of Quotes and Jobs where the company is listed on that Quote or Job's Contractors tab.
  - It shows what role the company has for that Quote or Job (contractor, subcontractor, etc.)
  - $\circ$  You can drill-down and open those Quotes and Jobs from the tabs.
- Companies now support the concept of *Child Companies*.
  - For example, you can create a parent company for a school district and separate company records for each school.
  - To specify the *Parent Company*, select it on the *Company Information* tab in the *Company Info* section.
  - There is a new Child Companies tab that shows all the child companies
    - It also allows you to select and link existing companies and make them child companies
    - Child companies can also have child companies.
- In a Material Order, when importing parts, you can now choose to Ignore Existing parts.
  - This makes it easier to reimport an updated list.
- There are new forms in the Schneider Project Management and JCT forms
  - These include Design Review, Execution Plan, and Sales to Ops Turnover

#### Network View

- The Network Root node now contains a *Reports* tab for running reports with data from the Network Tree devices.
  - These include *Devices* and *Device Points*.

- There is a new Enterprise report for Network View Devices across all the projects on a server.
  - Refer to the next section for details.
- The automation overview's device shape now has editable custom text.

#### **Enterprise Reports**

- Detailed Information from all the devices on the Network View is now stored in the database when a project is checked in. You can use this data to generate reports through the ADMIN → ENTERPRISE MANAGEMENT AND REPORTS tool.
  - Data from existing projects can be updated by clicking the SCAN PROJECTS FOR NETWORK VIEW DEVICES button on the *Reports* tab.
  - There is a data source for *Network View Devices* and a report named *Device Listing.xlsx.*
- The Data Sources for Estimate Parts contain additional columns for project and cost information.
  - These include *EstPartsByProjectAndPartNumber* and *EstPartsByPartNumberAndSystem*

#### **Prometheus Module**

- Prometheus has been updated to generate all Visio files using the modern .vsdx and .vsdm formats.
  - Visio 2013 or later is required.
- The Prometheus Labor tab now supports custom labor codes added to the Parts Database.
- The Prometheus engine now supports creating Lua Scripts to generate documents programmatically, including Visio drawings, Xml Documents, and Function Block Programs.

#### Reports

- There is a new tag for the <H> section to help name the tabs when using *GroupOnSheets*.
  - By default, the tab name is set using the value of the *GroupField* property.
  - You can now specify a different field with the *GroupTabNameField=field* specified.

# **Release 5.2.545**

January 7, 2022

#### **Core Module**

- If your organization uses the Email Forwarding feature, the *Emails* tab for a folder or Management Data record now displays and allows you to copy the full email address for that folder or record.
- You can now explicitly choose to show or hide the Part Numbers as part of the names of the devices in the Network View. Select VIEW→DEVICE PART NUMBERS to turn them off and on.
  - This replaces the previous VIEW $\rightarrow$ DEVICE DISPLAY FORMATS options.
- Enterprise Reports
  - There is a new set of four reports for reporting User Activity.
- For Enterprise companies, there is a new utility, ADMIN→FIND USERS, for administrators to find users amongst all their server.

#### **Engineering Modules (Estimating and Design)**

- The *Import from Excel* feature for a *System* node has been expanded.
  - The new IMPORT  $\rightarrow$  IMPORT PARTS AND POINTS FROM EXCEL works with the format from the EXPORT  $\rightarrow$  EXPORT PARTS/POINTS commands.
  - You can import parts, points, or both
- On the *Points* tab of an *Area* node, the APPLY POINTS TO PHYSICAL POINTS checkbox now works for nested areas.

#### **Estimating Module**

- Some items are also noted in the *Engineering Modules* section
- When browsing the parts list, the *Keywords* and *Part Number* boxes have been replaced by a single *Search* box. You can use this single box to search for specific part numbers as well as keywords in the part description and other fields.
- There is a new Service Estimates report template (*Task Sheets.xlsx*) that generates a set of task sheets that can replace the report on the Service Contract tab.
  - The Excel report is significantly faster.
  - The template can be copied and customized more easily

#### **Designer Module**

- Some items are also noted in the *Engineering Modules* section
- There is a new Visio Ribbon that contains all the Designer Tools
  - It will appear as a new tab near the end of the ribbon named *Designer* or *Design360*.
  - This contains all the commands from the ADD INS $\rightarrow$ DESIGNER TOOLS menu.
- The Bill of Material shape can now incorporate parts from a schedule chart in the drawing that's linked to a schedule node in the project.

- First, update the Schedule Node in the Studio project to indicate where the BOM Shape will find the key fields.
  - On the Schedule node's *Schedule* tab, click EDIT SCHEDULE TEMPLATE.
  - Locate the column in the schedule that contains the Part Number.
  - Set the *Is BOM Shape Part Number Column* property for that column to True.
  - Set the four other BOM Shape related columns to the appropriate column name (i.e., the letter of the column, as shown in the column list).
    - BOM Shape BomTag Formula
    - BOM Shape Quantity
    - BOM Shape System
    - *BOM Shape Trade* (must be a single string, like 'Electrical')
- Next, if you don't already have one, add a Schedule Chart shape and point it to the Schedule Node
- Finally, in the Bill of Material shape on the drawing, edit the properties and select the Schedule to include.
  - The list of available Schedules will only include those that have the properties set in the Schedule Template.
- There are additional Designer shapes and Network View nodes for the latest EcoStruxure devices
  - Created RP-V Designer shapes for the SE SmartStruxure stencil
  - Created Living Space Sensor Designer shape for the SE SmartStruxure stencil
  - Created SP-MRDM2 Designer shape for the SE Security Expert stencil

#### **Management Module**

- Forms
  - Text boxes in forms now have Spell Check capability.
    - By default, all multi-line textboxes will include the spell check by default.
    - There will be a green check if the spelling is good.
    - Otherwise, there will be a count of the misspelled or unknown words.
      - Click the count to correct the spelling.
  - There are additional properties you can customize when customizing forms with the MANAGEMENT DATA  $\rightarrow$  ADMIN  $\rightarrow$  CUSTOMIZE tools.
    - *Cue Text* is faint text that displays in an otherwise empty text box as a hint to the user.
    - If you specify *Info Bubble Text*, a blue info icon is shown next to the control which displays the text when the user hovers the cursor over it.
    - You can indicate that the form should use a *Multiline Textbox* for a field instead of a single line.

- Notes
  - You can now multi-select notes for context menu actions.
  - You can choose to hide (inactivate) notes.
    - Right-click on the note and select HIDE NOTE
    - Use the SHOW HIDDEN checkbox to view them again temporarily
    - Right-click on the hidden note and select SHOW NOTE to unhide.
    - There is a specific Management permission to allow a user to hide notes.

#### • Projects (Opportunities, Quotes, and Jobs)

- There is a new tool to compare and update the Quote and Job fields between the Studio projects and their corresponding Management Data records.
  - With a server project open, select TOOLS→SYNC PROJECT NAMES AND NUMBERS. You will be shown a table of the key fields from any Estimate or Job nodes in the project, how they compare to Management Data record (Quote or Job), and a link to click to copy one to the other.
    - The key fields are *Estimate Name* and *Quote Name*, *Quote Number*, *Job Name*, and *Job Number*.
- You can "book" an Opportunity and use it as the basis for a new Studio Job project and Management Data record.
  - To configure this feature:
    - First you need to specify which Job project should be duplicated as a template.
      - Go to MANAGEMENT DATA→ADMIN→SETTINGS and enter the Project ID in the Job Booking: Template Studio Job Project field.
      - You can view the Project IDs in the *Open Project* form. They appear in brackets after the Project Name
    - You can configure the feature to automatically copy files from the Opportunity's Files tabs to a specific folder in the new Job project
      - In the MANAGEMENT DATA→ADMIN→SETTINGS, enter the Folder ID in the *Job Booking: Folder to Copy Files to* field.
      - You can view the Folder IDs in a project by selecting VIEW $\rightarrow$ FOLDER ID NUMBERS.
  - Once configured, in the *Opportunities* list, right-click on the Opportunity and select CREATE JOB FROM OPPORTUNITY.
    - The template Job Project will be duplicated, renamed, and uploaded to the server.
    - A corresponding Job Record will be created with data (e.g., list of Contractors, Tracking dates, etc.) copied over from the Opportunity record.

- Any files in the Opportunity record will be copied into the Job record.
- You can add notes to a Job from the Jobs List without opening the Job.
  - Right-click on the Job and select ADD NOTE.
- On the Job's Notes tab, when the SHOW NOTES FROM CHILD RECORDS box is checked, you can right-click on an existing child record's note and choose to:
  - Open the Parent record
  - Add another Note to the sub-record
- The Email Forwarding service will automatically use the *Job Number* as an alias to forward emails to the Job record.
  - If there is a Studio project with a folder that has the Job Number as an alias as well, a copy of the email will be put in both locations.

#### • PM Tool

- For Material Orders and Purchase Orders there are additional data sources for creating reports.
- There is a new facility for storing *Subcontract Invoices* 
  - When editing a Subcontract, there is a new *Invoices* tab to store invoices and received payments. The totals of these amount are shown on the first tab as well.
  - There is a new sub-tab in the Job under *Project Management/Subcontract Management* that shows all of the invoices for all of the subcontracts for the job.
- There is a new facility for evaluating subcontracts (and thereby the subcontractors themselves)
  - When editing a subcontract, there is a new *Evaluations* tab.
  - All the evaluations for a subcontractor are shown on their record in the Companies table on a new *Evaluations* tab.

#### • Project Plan

- You can now run some right-click commands on multiple tasks at once, such as Cut and Copy.
- Data Sources and Reporting
  - The Project Fields tables (Contractors/Contacts, Employee Roles, Tracking Dates, and Tracking Fields) for a job are now available to all the sub-records (e.g. RFIs, Issues, Change orders, etc.)
  - The Offices table has been added as a data source for all records. If the record has an *OfficeID* field, you can use field code expressions such as <*Offices[JobOfficeID].OfficeName>* in a report.
- The Offices fields include *OfficeCsz* (City/State/Zip combined) and *OfficeAddress12* (Address1 and Address2 combined).
- Similarly, there are new data sources for mapping fields that represent Employees, Companies, or Contacts when the field you're looking for is not explicitly available. The names of these data sources make them seem more like functions:
  - e.g. <*GetEmployee*[Attention].*FirstName*>
  - e.g. <*GetCompany*[*RfiSubmittedTo*].*CompanyName*>
  - e.g. <GetContact[RfiContact].LastName>
- Job Cost Tracking (JCT)
  - Updated Revision Details to add filters for Cost Code and Description and aggregates of the cost and hours
  - Exports to Excel now include filters by default.
  - You can access the JCT for a Job by:
    - Right-click on the Job in the Jobs List and select OPEN IN JCT. You can choose to load only the summary tab or to fully load the selected job or jobs.
  - You can add JCT notes to a specific job from the JCT Summary tab.
    - Right-click on the Job and select ADD NOTE.

#### **Parts Database**

- There is a new table of *Cable Types*, which can be used on the *Points* tab of an Estimating or Design system node.
- The time to add a large number of new parts has been greatly reduced.
- There is a new Admin feature that initiates a Part Database sync directly on the server. This can be much faster than using a workstation (depending on the network setup) and does not monopolize the workstation.
  - You must have the Studio Windows Service installed and running on your network. Refer to the *Setup and Administration Guide* for more information.
  - Go to ADMIN  $\rightarrow$  ENTERPRISE MANAGEMENT AND REPORTS, and to the *Server Utilities* tab.
  - Click the Sync and Publish Parts on Windows Service Machine.
  - Choose the options of which servers to sync, which sync tasks to perform, and who to notify when complete.

# **Prometheus Developer Module**

- The Prometheus Point and Part objects have new fields that allow them to link to one another.
  - On the Point object is *Part Tag Link* and on the Part object is *Point Tag Link*.

- These fields should be values or expressions such that only one part and one point have the same value when the user runs the system.
  - For example, if there are three parts but their conditions make it so that only one is active at a time, they can have the same tag and tie it to the same point.
- When a part and point are linked, extra fields are available in the Points List and Part List tabs
  - Parts show some point fields and Points show some part fields

#### Reporting

- Excel reports now accept the new *AutoSizeRows* tag in the main <H> section.
  - This forces the rows to be auto-sized for cases where there may be long text with word wrap or explicit line breaks.

# **Release 5.1.544**

June 16, 2021

# **Core Module**

- The option to automatically bring up the Open Project list form when Studio starts has been expanded to include other startup forms.
  - In TOOLS  $\rightarrow$  OPTIONS on the *Workstation* tab, choose an option from the new SHOW ON STARTUP list.
  - Choices include: *Open Project List, Quote List, Opportunity List, Job List,* and the *Service Agreement List.*
- Schneider Electric users can now go to the HELP→REPORT STUDIO360 ISSUE OR SUGGESTION to provide feedback on a problem or idea.
- You can now archive older projects and remove their data from your main server.
  - Go to Admin  $\rightarrow$  Server Configuration and Tools  $\rightarrow$  Files and Projects  $\rightarrow$  Manage Server Projects
  - Select one or more projects, right-click and select ARCHIVE PROJECT FROM SERVER.
    - This will mark a project as *Archived* and offer to move it to a separate network location. The project can also be restored to its normal state.
  - The Open Project screen has a new checkbox to SHOW ARCHIVED AND DELETED projects.
- The Manage Server Files tool (ADMIN→SERVER CONFIGURATION AND TOOLS→FILES AND PROJECTS→MANAGE SERVER FILES) has some new options regarding deleting older files.
  - You can now permanently purge deleted folders and any files stored in them.

- Use the buttons in the PURGE DELETED FOLDERS group box,
- You can now act on a set of one or more selected projects instead of just all the projects
  - Choose the ALL PROJECTS or SELECTED PROJECTS radio button. The values in the lower section will update to reflect the totals for just the selected projects.
- The Windows Task Scheduler has been overhauled and new types of tasks have been added.
  - There is a new task type for scheduling the Parts Database to be synchronized and published on one or more servers.
  - There is a new task type for running Enterprise reports at a scheduled time and emailing the results to specific users.
  - These features requires that the Windows Service be installed and configured per the *Setup and Administration Guide*. Contact our Support team if you have any questions.
- There are enhancements to the ADMIN→ENTERPRISE MANAGEMENT AND REPORTS tool
  - There is a new report, *Part Numbers by Estimate*, that lists each distinct part number and quantity used in each estimate. This can be used for material forecasting.
  - The Server Utilities tab has a new button, Sync and Publish Parts on Windows Service Machine.
    - When you click the button, you can request that the Parts Database be synchronized and published on one or more servers.
    - Depending on the network performance and the number of servers being updated, this can be a much faster update that doing it directly on a workstation.
    - The request is handled by the Windows Service, and not the workstation of the user making the request. The Windows Service must be running the *Drone* task on an interval basis, as that task listens for the requests.
    - This feature requires that the Windows Service be installed and configured per the *Setup and Administration Guide*. Contact our Support team if you have any questions.
- In an Enterprise environment, Family Administrators can copy projects to another server.
  - Right-click on a server project in the Open Project List and select ADMIN→COPY SERVER PROJECT TO ANOTHER SERVER and choose a destination server.
  - The project will be copied as a local project to the remote server and then uploaded
    - Previous versions of files and Project Version history is NOT maintained
  - After copying there is an option to mark the original project as deleted.
    - This does not delete the source files, which requires a purge action.
- You can now distribute Bluebeam Profile and Toolbox files through Studio

- Copy the Bluebeam .bpx and .btx files in a new sub-folder of the *Resources* folder on the Company and Enterprise servers, similar to other types of files.
  - Refer to the section *The Resources Folders* in the chapter *Libraries, Templates, and Distributions* in the *Setup and Administration Guide.*
- The Background Updater will copy the files from the Company server to the appropriate App Data folder, specifically:
  - C:\Users\<username>\AppData\Roaming\Bluebeam Software\ Revu\<version>\
- If the file is new, Bluebeam will be launched to register the file.
- There are new Network Tree devices and Designer shapes for the Tridium JACE 8000 and add on modules.
- Issues with part descriptions with special characters being lost have been corrected.

- here are some new fields in the Estimate
  - The *Properties/Customer* tab has a new multi-line text field called *Customer Clarifications* field for adding a note to a report.
  - The Estimate Summary Tab now shows the Project Start Date and Project End Date
- There are a number of changes to how Travel Hours are calculated.
  - There are three new key options in the Estimate Settings on the *Expenses and Allowances / Travel* tab.
    - When INCLUDE PM WORKSHEET HOURS WHEN CALCULATING PM TRIPS (RECOMMENDED) is checked, the hours calculated on the PM Worksheet (meetings, percent of costs, etc.) are included in the calculation of total PM hours to determine the trips for Project Manager labor
      - This was not true by default previously.
    - When SEPARATE TRAVEL TIME INTO SEPARATE COLUMN is checked, the calculated travel hours will be shown on the Total Labor table in a separate column, added after other adjustments.
      - Without this option, travel hours are rolled back into Adjusted Hours.
      - The *LaborCodes* Data Source now contains the new column.
    - Check USE ADJUSTED HOURS (INSTEAD OF BASE HOURS) TO DETERMINE TRIP TIME to change the basis for the number of hours for each labor code.
      - Ths options forces the SEPARATE TRAVEL TIME INTO SEPARATE COLUMN option to be set as well.
  - You can now specify most of the Travel parameters (*Distance to Job Site*, *Average speed*, *Travel time (one way)* and *Costs per Round Trip)* in the Estimate Model.

- The *Update Parts to Database* feature now generates a separate list of Obsolete Parts that have no replacement specified in the database.
- There is a new simple method to export and import parts onto a System Node using a spreadsheet.
  - To export the list, right-click on the System and select EXPORT  $\rightarrow$  EXPORT PARTS TO EXCEL.
  - To import a list, right-click on a System and select IMPORT→IMPORT PARTS FROM EXCEL
    - You can use the export spreadsheet as a template for the columns and column names.
    - You can browse to the file and select IMPORT FROM FILE or copy the data onto the clipboard in Excel and choose IMPORT FROM CLIPBOARD.
- Estimate Groups
  - There is a new reporting data source, *CostsByEstimate*, that summarizes the costs for each contained estimate.
  - There is a new Report, *Estimate Group Margin Scenario Calculator*, that allows you to experiment with different Margin and Markup values to see the effect on the Contract Amount and profit.
- There is a new tool to manage and maintain a set of Estimate Model Templates.
  - If your company has several Estimate Model Templates (e.g., for different regions or different project types) a good way to maintain these in a single Library project with one Estimate node per model. This new tool enhances this method, especially if you have many models to update.
  - From the main menu select TOOLS  $\rightarrow$  LIBRARIES  $\rightarrow$  MANAGE ESTIMATE MODELS
  - This tool allows you to:
    - Quickly access the estimates in a list and edit their Estimate Settings
    - Select a source estimate and copy selected model properties from the source to one or more destination models.
      - This is equivalent to exporting the source model and then importing into each of the destination models.
    - Set a specific property value in multiple estimate models.
    - Export some or all of the Estimate's Models to the local machine and/or one or more servers.
      - Click OPEN EXPORT COMMANDS to create a rule file about which estimate models to export to what file names on which servers.
      - Click EXPORT MODELS to export the models based on the rule file.

- The Import from Bluebeam feature has a new option:
  - The new *NodeExportName* field in the mapping file allows you to choose an exported node (or node tree, in the form of a .stexp file) to bring in from the Node Library.
    - This is similar to bringing in a package, except that an exported system node can contain more detail.
    - You can also bring in nodes other than systems.
  - See the notes in this document for Build 5.1.543 for more details on the Node Library
  - Refer to the *Bluebeam Import Guide* (from the HELP menu) for more details.

#### **Design Module**

- There is a new reporting option regarding the *Is Existing* setting.
  - In TOOLS  $\rightarrow$  OPTIONS on the *Designer* tab, there is a new *Reporting* option to ALWAYS EXCLUDE PARTS MARKED 'IS EXISTING' (ON THIS WORKSTATION)
    - When this is checked, it ensures that the EXCLUDE PARTS MARKED 'IS EXISTING' option on the Designer *Reports* tab checkbox keeps itself set.
- You can now choose for the generated System Tree to treat all systems with the same name as a single system.
  - Normally a system is defined by the Visio file in which it is defined, and samenamed systems in different files are considered distinct.
  - On the Designer node's *Properties* tab, set the *Group System Tree by System Name* option to True.
- There are new Designer shapes and Network Tree devices for
  - $\circ$   $\,$  The Tridium JACE 8000 and add on modules.
  - The Schneider Electric Access Expert and Security Expert controller lines:
    - SP-MRDM2, AX-LP1501, AX-LP1502, AX-LP4502, AX-MR62E
  - The Schneider Electric EcoStruxure line:
    - RP-C Module CRS-HH-REL-10.

#### **Prometheus User Module**

- You can now generate the documents for Prometheus systems on multiple nodes at one time.
  - From a parent of the Prometheus-linked System and Schedule nodes (e.g. Area, Estimate, Design Root, Network Tree Folder) right-click and select
     TOOLS→GENERATE ALL PROMETHEUS DOCUMENTS.
  - The documents will be saved on the individual nodes
    - The one exception in the case of a Designer project, where it will direct generated Designer Visio drawing files to the first Systems Drawings folder.

#### **Prometheus Developer Module**

- You can now do a COPY and PASTE PART for parts for the Prometheus Part tree
- Prometheus Points have additional properties that can be set with expressions:
  - New properties:
    - Signal Range, Engineering Range (Low, High, Units)
  - Existing properties:
    - Software Tag, Description
  - These values will be calculated and stored in the *Points* data source for use in document generation and scripts.
- Prometheus Points now support the concept of Point Arrays
  - For example, to create 6 fan status points in an array numbered 1-6
    - Check the Is ARRAY box.
    - Set the ARRAY MIN VALUE to 1
    - Set the ARRAY MAX VALUE to 6
      - Or if the questions asked for two dimensions, set it to an expression like *NumberFansAcross* \* *NumberFansDown*
  - The index of the point will automatically be appended to the *PointName* 
    - e.g., *EaFanSts* becomes *EaFanSts1*, *EaFanSts2*, etc.
  - You can use the variable *PointArrayIx*, which will be set to the values from 1 to 6 (in this example), in an expression to create custom Software Tags and Descriptions
    - e.g., \$"Fan {PointArrayIx} Status" will create *Fan 1 Status*, *Fan 2 Status*, etc.

#### **Management Module**

- There are numerous updates to the Job Cost Tracking (JCT) features
  - Additional fields, calculations, sub-tables, and color-coding enhancements have been made (e.g., *Subcontract Details*).
  - Excel export formats have been enhanced.

- There is a new feature that allows you to customize almost any Data Grid in a Management Module form, such as the one in the Job List or Quote List with custom *Column Views*.
  - Beneath the Data Grid there is a drop-down list labeled COLUMN VIEW. Selecting an existing Column View will change the form based on the Column View, including:
    - Rearranging the order of the columns shown, hiding some columns, and making other normally invisible columns shown.
    - Adding additional filter controls above the Data Grid.
    - Adding additional aggregate values of a column (such as it's Total or Average) above the Data Grid
  - To create or edit a Column View, select (*Add or Edit Views*) in the COLUMN VIEW list.
    - Check or uncheck the columns to include or hide and use the arrow keys to reorder them.
    - As you select the columns to include and reorder, you can choose additional options for the selected column.
  - If you check the SUM, AVERAGE, MINIMUM, and/or MAXIMUM check box for a selected numeric field, a new label and box will be shown above the grid with the calculated value.
    - Enter text in the associated box to relabel the aggregate value.

- $\circ~$  For the FILTER, you can choose an appropriate one for the data type and it will be added above the grid.
  - For Boolean values, you can use *Check Box*
  - For String values, you can create a separate search *Text Box* or check the INCLUDE IN TEXT SEARCH box to use the existing SEARCH box.
  - For a list of values, you can use the *Drop Down List*, *Drop Down List* (*Multiselect*), or *Check List Box*.
  - You can add some control over the layout of the filter controls using the ROW SPAN and COLUMN SPAN values, along with ROW BREAK.
    - If you view the controls as being laid out in am invisible table, setting these values allow you to have a control span multiple rows and/or columns.
    - The ROW BREAK will force the control to start at the next row of the table.
- You can generate a new generic report template for a Data Grid in a form
  - Select Generate New Report Template from the list of reports and click RUN
  - The template report file will be saved in the correct folder for the form and opened to edit.
    - You can also access the report folder for the form by clicking the OPEN REPORT TEMPLATE FOLDER link.
  - $\circ$  You can edit the report template as needed, such as reordering, renaming, or removing columns.
  - Refer to the *Reporting Guide* for more details on report templates.
- There are some new features for the <u>Quotes</u> form.
  - You can now open an Estimate project directly from the Quote List. Right-click on the quote and select OPEN STUDIO ESTIMATE PROJECT.
  - The linked Estimate's *Quote Number*, if specified and different than the quote's, will be shown on the *Quote Information* tab.
- Embedded Estimates in sub-records now show *Markup* and *Margin* as percentages.

# Reporting

- There are new functions in the Expression Language
  - DollarsToWords, ColumnMin, and ColumnMax.

# **Release 5.1.543**

March 18, 2021

### **Core Module**

- You can now create a library of Studio export files representing configured nodes (e.g., an Estimate System with parts and other data or a controller device with software points) that will show as options on the ADD menu when building the Project or Network Tree.
  - The .stexp files can be generated from any node by right-clicking and selecting EXPORT  $\rightarrow$  EXPORT TREE NODES or EXPORT TREE NODES AND FILES.
  - You store the .stexp and .stzip files in your Studio Application folder, in the *Node Libraries* sub-folder.
    - You can access the Studio Application folder by going to TOOLS→OPTIONS, the Local Files tab, and clicking the Open [Application Data] Folder link.
  - There will be a sub-folder for *Company* node files, as well as one for *Enterprise* (if applicable).
    - You can also create a *Users* folder to create a library that is only used on that workstation.
  - The node exports can be stored in a folder structure, which will be used as the menu names when these items are added to the Add menu.
  - When you click the Add menu on a node, any node exports that are valid children of the selected node (and only those) will be shown and available to add.
- There is a new form available for Schneider branches and partners to request a quote for Schneider to create graphics for a project.
  - On a Job or Estimate node, right-click and select TOOLS  $\rightarrow$  SE GLOBAL GRAPHICS ENQUIRY.
  - You will be taken to a web page to complete and submit your request.
- There are additional properties on the *Previous Versions* tab of a file.
  - To view these columns, select VIEW  $\rightarrow$  FILE VERSIONS ADDITIONAL COLUMNS.
  - The new columns include a custom *Description*, along with *Revision*, *Revision Details*, *Developed By*, *Reviewed By*, and *Approved By*.
  - You can right-click on a previous version record and select EDIT FILE VERSION PROPERTIES to change them.

#### **Estimating Module**

- When scanning parts in the Estimate's *Update Parts to Database* tab, it will now indicate when parts that come from a Prometheus system have changes.
  - To update these parts, go to the Prometheus system and force it to update.
  - For a single System Node, go to the Prometheus tab and click the SAVE button.

- For a Prometheus Schedule Node, click the UPDATE PROMETHEUS SYSTEMS button.
- On the *Material by Vendor* tab, individual vendors can now be set as non-taxable by setting the *Don't Apply Material Tax to this Vendor* option.
- The Allocate Costs to Systems feature and report have been updated significantly.
  - This feature, available on the Estimate's *Reports* tab on the *Allocate Costs to Systems* sub-tab, is designed to reallocate the global, area-related, and markup costs of the estimate to the systems themselves. This is often used to create a *Schedule of Values*.
  - In the updated version
    - System-level subcontract and expense costs stay with the system.
    - Area-level subcontract and expense costs are distributed to the systems below it.
    - The new ALLOCATION SETTINGS are simpler, and let you decide the proportions of how the costs are distributed.
      - You can choose proportional to actual system costs, equally, or with custom percentages you specify.
    - You can select systems to be *Ignored*, which excludes them from having global costs assigned to them.
    - Some of the granular output columns have been removed.
  - The *Allocated Costs (By System)* report has been updated to reflect the new columns.
    - If you have a custom version of this report, it will need to be updated.
       Please contact our technical support team if you need assistance.
- The Estimate Summary tab now shows the *Quote Status* from the Management Data's linked Quote record.
- The System Summary tab of a Package or an MFL System Viewer will now display labor costs, using either the current Estimate's labor rates or the Default Estimate Model's labor rates.

# **Design Module**

- There is a new tool in the DESIGN TOOLS Visio ADD-INS menu called UPDATE POINTS AND CONNECTIONS.
  - This tool will show all the connected and unconnected points in the drawing and allow you to make the connections and update some of the properties of the points quickly.
    - The left side lists all of the points available on controllers that are not currently connected.
    - The rights side shows all the sensor and I/O Point shapes that are not currently connected.
    - The bottom lists all of the connected points and their properties.

- You can right-click on a point in any of the lists to edit, connect, and select the corresponding shape in the Visio drawing.
- The Auto Connect All will connect as many points as possible in the orders shown.
- When you connect SmartX Sensors to the MP-X controller they will now generate software points based on their part number and configuration.
  - These will be shown on the Software Points tab and the Controller Checkout reports.

#### **Prometheus Module**

• There are new CALL functions to get the total power (VA) for the list of generated parts (*GetVAForPartList* and *GetNetVAForPartList*).

# **Management Module**

- General
  - On the *Contractors* tabs for the *Opportunities*, *Quotes*, and *Jobs* records, you can now specify a value for "Not Applicable" and multi-select to set this from the right-click menu.
    - First, create a Company record (MANAGEMENT DATA→CONTACT MANAGEMENT→COMPANIES) with the name "Not Applicable" or something similar.
    - Save the record, then reopen it. Note the Company ID value that has been assigned, shown at the bottom of the Company Information tab.
    - Go to MANAGEMENT DATA  $\rightarrow$  ADMIN  $\rightarrow$  SETTINGS
    - In the *Projects* section, set the field for "Not Applicable Company" to the Company ID.
  - Added *Created By*, *Created Date*, *Last Modified By*, and *Last Modified Date* fields to numerous records.
- Quotes
  - Added *Estimate Started Date* and *Estimate Approved Date* Tracking Date fields.
    - You can add or remove fields using the MANAGEMENT DATA→ADMIN→CUSTOMIZE tools.
- Jobs (Project Management Tool)
  - All lists can now show a *Has Files*? column to indicate for each sub-record whether or not it has files associated with it.
  - *Status Note* is now available as a *Job* field.

#### Reporting

• The Enterprise Report for *Projects* now includes a *Created Date* column.

# **Release 5.1.542**

January 6, 2021

# **Core Module**

- There is a new tool for searching for files in a project.
  - The new TOOLS  $\rightarrow$  SEARCH FILES utility will search for files in the current project, as well as in any projects that are linked by having shortcuts to them in the project.
  - This tool is only available on server projects. If file permissions are being enforced, it is only available to account administrators.
- For Project nodes (Customer Site, Job, Estimate, and Design) you can now export the Project Properties (e.g., those on the Site, Building and Office tabs) to Excel to import into a different project node.
  - Right-click on the project and select EXPORT  $\rightarrow$  EXPORT PROJECT PROPERTIES. The file will be saved on the *Files* tab.
- When using the *Remote Login* screen, you can choose to use the other server's parts database instead of your home server's.
  - Select the server and click the USER REMOTE SERVER'S PARTS DATABASE button to enable this feature for a remote server.
- You can now select files and folders in server projects to have automatically downloaded each day by the Background Updater.
  - Right-click on a file in the Files tab, or a folder in the Project Tree, and select SUBSCRIBE TO AUTOMATIC DOWNLOADS.
  - To unsubscribe, right-click again and select UNSUBSCRIBE FROM AUTOMATIC DOWNLOADS.
  - You can view your currently selected files and folders from VIEW $\rightarrow$ AUTOMATICALLY DOWNLOADED FILES.
- Studio now recognizes and supports WorkPlace Tech files that use the new .vsdx file format (generated by version 5.10 of the stand-alone version of WorkPlace Tech).
- You can now delete schedule node rows when filters are being applied.
- When using the *Custom Templates.xml* file to create a menu of custom templates and reports for users to select on the *Files* tab by right-clicking and selecting from the NEW menu and using the {*CurrentUserInitials*} option for the *DefaultFileName* property, the default two-letter initials for an employee can be overridden using the MANAGEMENT DATA→ADMIN→HUMAN RESOURCES→EMPLOYEES table.
  - This feature requires the Management Module to be configured.

- There is a new type of project estimate that is intended for very simple applications, like part purchases, time-and-material quotes, or change orders.
  - The new *Simple* Estimate can be created in the same way as the standard project Estimate or a Service Estimate.
  - The *Contract Amount* is automatically calculated using the *Sell Price* values of each part and the *Sell Rate* (per hour) of Labor.
    - You cannot explicitly set the markup or margin
  - Most global costs, such as *Travel*, *Risk*, and *Taxes* have been removed.
  - You cannot change a Simple Estimate to a regular project Estimate, or vice-versa.
- If using labor sub-codes, there is a new option to SHOW LABOR SUB-CODES on the Estimate's *Labor/Total Labor* tab.
  - If checked and you select a labor code with sub-codes, there is a button to EDIT SUB-CODES without having to go into the Estimate Settings.
- There are some new options in Estimate Settings
  - The *Expenses/Taxes* tab can now be hidden by checking the HIDE EXPENSES/TAXES checkbox on the *Expenses and Allowances/Taxes and Freight* tab in Estimate Settings.
  - The Sales Tax option on the Summary tab can also be hidden with a checkbox on the *Expenses and Allowances/Taxes and Freight* tab in Estimate Settings.
- The *Allocate Costs to System* feature has been updated. This feature is found as a sub-tab of the Estimate's *Reports* tab.
  - The purpose of this feature is to create a secondary allocation of all the costs in the estimate to the systems such that the costs still add up to the total costs in the Estimate. This is often used for a Schedule of Values for accounting purposes.
  - The interface and settings have been simplified.
    - You can now choose to distribute the global costs of the Estimate (those specified in areas and on the Estimate) as one of:
      - Distribute in proportion to the other system-level costs (material, labor, and system-level subcontracts, risk, and expenses)
      - Distribute evenly among all systems
      - Distribute using custom percentages per system.
    - The Markup (Gross Margin) can also be distributed in those ways as well.
  - There is a new column to *Ignore* the column for the purposes of distributing global costs. This is not the same as Excluding a system, and only affects this allocation report feature.

- Since the calculations needed to be updated, as they did not account for newer system-level costs, the column names and values in the report have been changed significantly as well.
  - The *Allocated Costs (By System)* report has been updated to match the new data.
  - If you have a custom version of this report, it will need to be updated as well. If you have questions about this, please contact our support department and we will be happy to help.

#### **Design Module**

- There are three new CRS controllers that provide lighting and relay control available on the *SE EcoStruxure* stencil.
  - These include the RP-C-EXT-REL-4 Relay module and the RP-C-EXT-0-10V-4 and RP-C-EXT-DALI-1 lighting modules.
- There are now connection points on the ends of the point wires on the MP-X controllers in the *SE EcoStruxure* stencil.
- The maximum size of BOM Tags and Software Tags has been extended to 50 characters.

#### **Management Module**

• There is now a *Clear Filters* link near the record count below the table of data on many forms that will show when the data is being filtered.

#### Reporting

- There is a new column, \_*RowNumber*, which is automatically added to all data sources.
  - This can be useful for reports with complex formulas or conditions.

# Release 5.1.541

October 16, 2020

# **Core Module**

• There is a new *Reporting Guide* available on the Help menu that details how to run, create, and customize reports for Estimating, Designer, and Management modules.

- When adding Packages to a System's part list
  - If the name of the system is still 'System', it will be updated to the name of the package.
  - There are new options for whether to merge or overwrite the *Proposal Items* field values from the package to the system.
  - All the options have been moved into a new form accessed from the EDIT button.
- When working with subcontracted labor and/or material, you can control how these costs are shown on the system and area's *Labor* and *Summary* tabs.
  - In the Estimate Settings, on the *Other* tab, there are options for AREA/SYSTEM LABOR TABLE OPTIONS (FOR LABOR AND SUMMARY TABS).
- For Sales Tax specified on the *Expenses/Taxes and Freight* tab, there is a new option to INCLUDE ALL MARKUP IN THE TAXABLE AMOUNT (and not just the markup on the selected costs).

#### **Prometheus Module**

- There is a new feature in Prometheus that allows to define multiple Configurations of controllers.
  - A configuration can be a single controller or multiple controllers and defines rules for how the points generated by the Prometheus system should be assigned to the physical points on the controllers.
  - Refer to the updated Prometheus Module Guide for full details.
- There is a new check when running a system to determine if the version of Studio needs to be updated in order to run the system.

# **Management Module**

- The *Job Add/Edit* form has been updated with a number of new tabs under the Project Management tab.
- The *Job List* form has been updated
  - You can now filter by multiple Project Managers at once. The drop-down list now contains an item labeled *(Select...)* that will bring up a form to select any number of people.
  - You can now right-click on a Job record in the list that has an associated Studio project and choose to OPEN STUDIO JOB PROJECT.
  - When selecting people on the Employee Roles tab, the lists are normally restricted to the employees in the associated Employee Group. There is a new option to SHOW ALL next to each list that will show all the employees for that office.

# **Release 5.1.540**

September 3, 2020

# **Core Module**

- Smartware Studio/Studio360 is now being distributed as a 64-bit Windows Application.
  - The application can now use more memory and open larger projects.
  - Studio can continue to interact with both 32-bit and 64-bit versions of Microsoft Office.
  - There are new database drivers that might install automatically as needed.
  - In rare cases, there could be some other compatibility issues that haven't been encountered yet or cases where the Studio license needs to be reset. Please contact our technical support team with any problems.
- For the Studio News Feed displayed in the background of the Studio window there is now an option to open the feed's web page in a browser for easier navigation.
- There are updates to Studio Projects:
  - Project Templates and their files will automatically be downloaded to the workstation by the background updater. This keeps them up to date so that they can be duplicated as new projects even when disconnected from the network.
  - The Open Project form's PROJECT TYPE filter buttons will now save their state between Studio sessions.
  - Studio Projects saved in one Region can now be loaded in another.
- Submittal Generator
  - $\circ$  On the Files Node there is a new button to sort the files alphabetically.
  - There is a new property (MAXIMUM LEVELS OF TOC) available on each node to limit how many levels of detail that section's Title Page's Table of Contents should show. This is useful for the topmost sections of larger submittal documents made up of many pages and files.
  - There is a new property (WATERMARK IMAGE) that lets you specify an image to be superimposed onto each page.
  - There is a set of four properties that allow you to control the size of each of the three header images.
    - The MAXIMUM HEADER IMAGE HEIGHT property forces any of the three images to be made smaller if their normal height exceeds the specified value.
    - The GROW [LEFT] HEADER IMAGE TO MAXIMUM HEIGHT properties, if set to True for any of the images, forces a smaller image to grow to the specified maximum.

- There is a new feature available in the Studio Windows Service that automatically does a full sync and publish of the Parts Database on a scheduled basis.
  - This feature requires that the Studio Windows Service be installed. Refer to the chapter in the *Setup and Administration Guide* for details on the Windows Service.
  - If you are already running the Windows Service, be sure to stop it and install this latest version of Studio before setting these options and then restarting the service.
  - To enable the feature, go to ADMIN $\rightarrow$ WINDOWS SERVICE and the *Parts Database* tab. Select the server (or servers) to update, and the updates you want it to do:
    - SYNC PARTS DATABASE (to Smartware)
    - PUBLISH PARTS DATABASE TO USERS
    - SYNC PART PDFs
    - SYNC DISTRIBUTABLE FILES
    - The number of days between syncs and the time of day to do the updates
- When creating a menu of custom templates and reports for users to select on the Files tab by right-clicking and selecting from the New menu, there is a new option to create more customized names for the new files.
  - In the *Custom Templates.xml* file, you can now include expressions in the *DefaultFileName* property.

```
<DefaultFileName>
Letter_{FormatDate(Today(), "yyMMdd")}_{CurrentUserInitials}.docx
</DefaultFileName>
```

- The values inside the braces are evaluated as expressions using the Smartware Expression Language syntax (see the Studio Help menu for a complete Guide).
- This example includes a version of the date the current user's initials, as in *Letter\_200903\_JD.docx*
- In the Valve and Actuator Selector used in the Valve Schedules and Parts Browsers you can now specify pressure in Feet Head (in addition to PSI for English and kPA for metric). All pressure values on the screen will adjust accordingly.
- There are new features for the Schedule Node:
  - You can now reload a schedule template into an existing schedule that has data. This can be used to repair a schedule in case a column is accidentally deleted. When editing the Schedule's Template, click REPAIR TEMPLATE.
  - When editing the Formula property in a calculated column it will now bring up a basic expression editor.
- There are new features for Multi-File Libraries
  - There are new search filters in the *Insert Files from MFL* Form.
    - HAS SOFTWARE APPLICATION File
    - HAS GRAPHIC DEFINITION FILE

- When inserting a System node from an MFL, it will track the MFL it comes from.
  - The System Node's icon will include a smaller library icon
  - The new COPIED FROM MFL property will show which library
  - If you later right-click on that node and select INSERT FILES FROM MULTI-FILE LIBRARY, it will automatically filter to that same MFL
- When editing an MFL and viewing the Files list, you can now mark a file's specific type (e.g. *Designer Drawing*) by right-clicking on it as you would in a Studio project.
- There are new features and updates for Network Tree devices:
  - You can now import multiple Studio Export Files at once. In THE IMPORT→IMPORT TREE NODES tool there is a new checkbox (IMPORT ALL OF THE FILES) that will import each .stexp file copied onto the Files node.
    - This can be used with custom tools that can create .stexp files using controller data from other software systems.
  - You can now view a device's associated PDFs from a new button next to the PART NUMBER property on the *Properties* tab.
  - The Tools→Generate Automation Overview tool will now use *Part Number* field when the *Friendly Part Number* cannot be found in the parts database record for the controller.

#### **Design Module**

- There is a new *Generic Controller* shape on the *Page Add Ins* stencil designed for creating devices that have only software points, such as a VSD (Variable Speed Drive).
  - There are no specific part numbers available for this shape. The intent is for users to create an instance of this shape, add the software points, and fill in the part number and description. Once created, these shapes can be collected into a custom Visio stencil for reuse.
  - You can use Visio's drawing tools to redesign the look of the shape.
  - This shape is also available on the right-click menu of available shapes.
- There are updates to the EcoStruxure controller stencil shapes
  - The Designer stencil contains a new shape for the new AS-P-NL controller.
  - The SmartX Controller (MP-X) shapes have a new option to show only a single wire for each connected point, suppressing the common wire.
    - You can access this option from the controllers' Part Properties form on the various I/O point tabs, where there is a new SINGLE WIRE checkbox column.

- There are updates to the Sensor and I/O Point BOM Tag Auto-numbering
  - Duplicating a sensor shape with a default BOM Tag will now auto-increment (e.g. TS1 changes to TS2) to prevent duplicates.
  - $\circ~$  The auto-numbering can also be applied to I/O Points shapes based on their software tag.
    - In the Parts Database, when editing and importing Software Tag sets, there is a new *DefaultBomTag* property that can be set for each software tag.
    - When an I/O point is added and the software tag's default BOM Tag is in use, it will offer to change in the same way as with sensors.
- The Page Wizard has two new features:
  - You can choose one of two new page numbering formats that make it easier to insert pages into existing projects without renumbering the rest of the pages. The new formats are:
    - A number, followed by a letter (e.g. 5, 6, 6a, 6b, 7...)
    - Outline numbering (e.g., 5, 6, 6.1, 6.1.1, 6.1.2, 6.2, 7,
  - You can choose to replace the Title Block shape on the pages with the Company Version.
    - The Company Version is specified in the ADMIN→LIBRARIES, TEMPLATES AND STANDARDS tool on the Designer Module tab.
  - Ability to change title block to company default
- When using the Error Checking tool, you can now right-click on an obsolete part and replace it with the recommended alternate Part Number.
- There are new features when working with Schedule Shapes:
  - You can now point a Schedule Shape at a folder in the Network tree and create a schedule of selected properties of the devices.
    - Add a schedule and choose the Devices in Network Tree *Schedule Mode*.
    - Click SELECT PARTS to choose a folder or device from the network tree.
    - Check the INCLUDE CHILD ITEMS box
    - Choose the *Item Type* value to both filter the devices shown and choose the properties that are available. The more specific the type (e.g. *BACnet Device* over *Device*), the more properties (e.g., *BacnetInstanceNumber*).
    - Refer to the Property Sheets and Reports tool discussion in the User's Guide for more detail, as the Item Type in the Schedule is the same as the one used there.
  - When editing the ROW FILTER, you can click EDIT and bring up a simple expression editor
  - You can now sort the rows in the Schedule shape by a different column (or columns) than the schedule node itself.
    - List the columns in the SORT ORDER box. Click the HELP button for more details.

- You can now create custom Detail Images for individual projects.
  - First, create a new *Detail Images Folder* in your Designer project by rightclicking on the Designer node and selecting ADD→DESIGNER→DETAIL IMAGES FOLDER.
  - Copy the images to use as detail images onto the Files tab of the new folder.
    - There are additional properties available for the files if you right-click on the file and select Properties to make the File Properties tab visible, including *Detail Image Width*, *Detail Image Height*, and *Detail Image Type*
  - When you are selecting an image in the shape's Part Properties form on the *Detail Images* tab, the custom ones will be at the top of the list with a *Locale* of Project.
  - There is also a new tool to convert a select Visio shape (or shapes) into a graphic file to use as a detail image.
    - Select the shape or shapes and go to the DESIGN TOOLS (or ADD-INS→DESIGN TOOLS menu and select SAVE SELECTED SHAPES AS DETAIL IMAGE.
    - The new image will automatically be saved in the *Detail Images* folder.

- There is a new Estimate Settings button (a green gear) available in the toolbar that opens the Estimate Settings form.
- In a System's Parts List you can now right-click on a part and view all the related PDFs.
- There are new views relating to Labor:
  - On the Estimate's *Labor/Total Labor* tab, there is a new option to SHOW LABOR SUB-CODES and their calculated totals in hours and dollars in the table.
    - These values are for reference only. Refer to the Estimate Module User's Guide for more details on Labor sub-codes.
  - On the Estimate's *Labor/Global Labor Adjustments* and *Block Labor Hours* subtabs, there is a new option to ALSO SHOW ESTIMATE'S TOTAL LABOR as additional read-only rows.
    - These values may be helpful for reference purposes when entering values for these tabs.

- You can have the total Adjusted Labor for each labor code rounded up to meet reporting requirements.
  - In the Estimate Settings form, on the *Labor/Labor Codes* tab, there is a new column for *Round to Hours*. Entering a value (e.g. 8) will cause that labor code's adjusted hours to be round up to the nearest number of hours (e.g., 37.5 hours would round up to 40).
  - There is an additional option to not round up if the number of adjusted hours in the labor code is only slightly above the previous value. For example, if rounding to the nearest 8 hours and the total ENG hours was 8.04, this setting would *prevent* the rounding up to 16.
    - In the Estimate Settings, go to Labor/Other Labor Options and check the WHEN ROUNDING LABOR HOURS, DON'T ROUND UP IF < 0.05 OVER checkbox.
- On the *PM Hours Worksheet* you can now specify phases as a percentage of the total time instead of specific dates. This is useful in adding phases to an Estimate Model template, as you can assign proportions of a project's duration to a phase instead of specific dates or days.
- In the Travel Expenses, the Task Hours per Labor Code used to calculate the number of trips is, by default, based on the unadjusted hours. You can now choose to use the Adjusted Hours instead.
  - In Estimate Settings, go to the *Expenses and Allowances/Travel* tab and check the USE ADJUSTED HOURS TO DETERMINE TRIP TIME box.
- There are new options to control how data is shown on the *Summary* tab of a System or Area node.
  - Costs entered on the *Itemized Costs* list are now shown as a line item in the Totals box.
  - There are new options on the Estimate Settings' *Other* tab that let you control how subcontracted labor and material are shown.
    - For subcontracted labor, you can choose to
      - Continue to include that labor in the Labor table
      - Remove that labor from the Labor table, but add it in the Totals table to the 'Subcontract' line
      - Remove that labor from the Labor table, but add it in the Totals table as a new 'Subcontracted Labor' line
      - Remove that labor from the Labor and Totals tables completely.
    - For subcontracted material, you can choose to
      - Continue to include that cost in the 'Material' line of the Totals Table
      - Show the cost as a separate 'Subcontracted Material' line

- There are new options for controlling the *Estimate Summary* tab. Refer to the *Other* tab in Estimate Settings.
  - You can control the Margin with two options:
    - You can choose to FIX THE MARGIN at a specific value; and
    - You can add a value to Warn if Margin below. If the margin is set to less than this value, the cell will highlight yellow on the Summary tab.
  - You can also choose how the Markup section is shown:
    - The default is to ALLOW MARKUP TO BE SEEN AND FIXED; or
    - You can set it to HIDE OPTION TO FIX MARKUP (allowing the user to still fix Margin or Contract Amount); or
    - You can HIDE MARKUP BOX COMPLETELY, leaving the Margin controls.
- There are some other new options in the Estimate Model and Settings:
  - For Repetition Curves, you can now specify the 2<sup>nd</sup> and 3<sup>rd</sup> step positions for the Engineering/Software Task repetition curve type. Previously, these values were fixed so that the curve changed at *Typical Of* values of 2 and 3.
  - Users can now specify their own Default Template to use for new estimates. The first option is *Company Default*, which is specified in the ADMIN→LIBRARIES, TEMPLATES AND STANDARDS tool on the *Estimate Module* tab.
  - When loading parts of an Estimate Model into an estimate from the *Import/Export Estimate Model Templates* tab there are new options to explicitly include or exclude *Subcontract Codes* and *Estimate Options*.
- There are updates to the Estimate Data Sources and Reports:
  - In the *LaborCodes* data source there are new Boolean columns, *IsSubCode* and *HasSubCodes*, that let you distinguish and filter sub-codes from regular labor codes.
  - There is an option to include global labor as separate systems in the data sources for reporting purposes.
    - In Estimate Settings, on the *Other* tab, check SHOW GLOBAL LABOR AS SYSTEMS IN REPORTS.
    - Global Labor includes:
      - Block Labor specified on the Estimate
      - PM Worksheet Hours
      - Global Labor Adjustments
- There are Estimate-related reports in the ADMIN→ENTERPRISE MANAGEMENT AND REPORTS tool:
  - The *Estimate Parts* report shows parts from all the cached estimates on all the selected servers.
  - The new data sources include:
    - EstAreas, EstSystems, EstParts
    - EstPartsAggregated
    - EstPartsByPartNumberAndSystem

- In the Property Sheets and Reports tool, you can now view and edit the *Proposal Items* field in the *Systems and Areas* report.
- When adding a package to a system it will now take any *Proposal Items* specified in the package and append them to those in the System.
  - Previously it replaced any existing Proposal Items

#### Management Module

- There have been numerous updates to the Management Module forms, including:
  - The Jobs list and Job Form have been greatly enhanced. The Job's Project Management tab has been significantly restructured.
    - Change Orders and Change Requests can now contain embedded estimates.
  - There is a new Opportunities table along with additions to the Contact Management forms (Companies and Contacts)

#### **Prometheus Module**

- There is a new PROMETHEUS DASHBOARD available from TOOLS→PROMETHEUS→ PROMETHEUS DASHBOARD.
  - The Dashboard lists all the Prometheus systems available from Schneider Electric with version numbers and dates, along with access to their *Help Fi*le, *Datasheet*, and a PREVIEW of the system.
- When linking a System Node to a Prometheus system, if the system's name is still "System" it will automatically be renamed to the name of the Prometheus system.
- Prometheus now automatically swaps out the title block shape for your company's default title block when generating Visio Designer drawings.
  - You can set the company title block from the ADMIN $\rightarrow$ LIBRARIES, TEMPLATES AND STANDARDS tool.
- From a System Name column, there is a new right-click menu option to GENERATE SYSTEM NODES that are referenced in that column but do not yet exist in the estimate.
- When editing a Prometheus system as a developer:
  - Prometheus Questions now support Copy/Paste.
  - The *Current Responses* tab has a VIEW DATA SOURCE button.
    - There is a new Data Sources for *Point Counts by Type*
- There is a new Bluebeam Import for Prometheus.
  - For each Bluebeam shape you define a named .PromData file in the import.
     When the Bluebeam data is imported, these files are used to create a system node linked to the system for that response file
  - Refer to the *Prometheus Module User's Guide* (from the HELP menu) for more details.

- Prometheus schedules now support bidirectional editing of values.
  - If a column in the Prometheus schedule has its *Update Direction* property set to *Both*, when values are edited in a schedule row the underlying Prometheus system is invoked to recalculate the rest of the system, updating other columns, parts, and points as needed.
  - Refer to the *Prometheus Module User's Guide* (from the HELP menu) for more details.

#### Reporting

- There is a new report format that will create a formatted email to send (instead of an Excel or Word report).
  - In a folder of report templates, add a text file with an extension of .email (e.g., *Notify Accounting Ready to Book.email*).
  - The format of the text file is simple and specifies each field as a combination of text and report fields.

```
To: accounting@ourcompany.com
Cc: salesmanager@ourcompany.com
bcc: cfo@smartwaretech.com
Subject: We are Ready to Book Job # {JobNumber}: {JobName}
IsHtml: False
Body: The above referenced job for Customer '{CustomerName}'
```

- For this format, the fields must be enclosed in braces ({ and }) instead of angle brackets.
- The Body of the email starts at the *Body* tag and continues for the rest of the file.
- Report fields can include expression.
- If *IsHtml* is set to true, you can include HTML tags in the *Body*:

```
IsHtml: True
Body: The above referenced job for Customer <b>{CustomerName}</b>
```

- When you run the report, it does NOT send the email itself. Instead it creates an outgoing message in your default mail program (e.g. Outlook) that you can review before explicitly sending.
- In the [List] tag used in some Estimate reports to create a bulleted list of Proposal Items, there, there is a new parameter (*StyleByLevel*=True) that tells it to use the *Level* column to override *StyleIndex*.
  - In most cases, this parameter should be used with the ProposalItems data source (unless you are using the Alpha format)

# **Release 5.0.539**

February 17, 2020

# **Core Module**

- You can quickly add an Outlook reminder to your calendar based on a file in a project.
  - Right-click on the file and select SEND TO $\rightarrow$ OUTLOOK REMINDER. An Outlook reminder will be created with a copy of the file
  - For files in a server project, you can also select SEND TO→OUTLOOK REMINDER AS STUDIO SHORTCUT to include the Studio shortcut file that can open the actual file from the server through Studio (but only for Studio users on your network).
- There are enhancements when using the *Insert from Multi-File Library* form:
  - You can now switch between folders in the Project tree to save the files to without closing and reopening the form.
  - You can now drag and drop or copy and paste files from the selected MFL's file list directly to a folder in Studio or in Windows (as opposed to using the INSERT button).
  - When inserting a Studio export file, it will offer to check out the project if needed to add the imported nodes to the project.
  - The Summary tab now has more properties listed.
- In the Submittal Generator, the options to exclude a section's pages from the Bookmark Tree or the Table of Contents are now separate. You can include the pages in neither, either, or both.
- The Network Tree Device property for EcoStruxure and Niagara (and Tridum) Devices has been updated.
  - On the Properties / Software tab, all these devices have an EcoStruxure Software Version or Niagara Software Version property intended to indicate the version of the software installed on the device.
  - The Property Sheets has reports for EcoStruxure Devices and Niagara Devices that include these properties.
    - Tridium Devices are now included in the Niagara Devices Property Sheet report.
- The news feed web page that appears on the main screen will now use Windows IE11 settings for a more consistent display of the site.

# **Design Module**

- The Find and Replace tool has been enhanced.
  - There is a new option to filter to unmatched points.
  - There are now options to show and update accessories.
- For the Bill of Materials shape, you can now select a set of individual pages in the drawing whose parts are to be included in the list.

- The Page Wizard has been updated to allow you to replace the Title Block shape in a set of drawings. This can be useful if a company name or logo is changed, or when using drawings created by a different office or company.
  - An administrator must first specify a company Title Block by going to ADMIN->LIBRARIES, TEMPLATES, AND STANDARDS.
    - On the *Designer Module* tab, select a custom stencil (that is already distributed to all users), and then specify the name of the Title Block master in the stencil
  - In the Page Wizard, check *Replace Title Block Shape with latest company version*.
- The Separable Relay shape has been updated to be able to hide the coil and keep the contacts.
- The Schneider SEZ Room Controller stencil shapes have been updated.

- There is a new tool for updating the *Typical Of* Value for the systems in an area.
  - On an Area node, right click and select TOOLS  $\rightarrow$  MULTIPLY TYPICAL OF VALUE FOR SYSTEMS BY X.
- For Subcontracts on a System node, you can align the Unit Quantity value to the Typical Of value of the system.
  - On a subcontract row, check the *Is Typical Of* checkbox. The *Unit Quantity* column will be fixed to the *Typical Of* value for the system, and the Subcontract Amount will be calculated with that *Unit Quantity* and the specified *Cost per Unit*.
- You can now exclude individual parts from a system without deleting them or setting their Quantity to zero.
  - In the upper-right corner above the parts list, check the SHOW COLUMNS: EXCLUDE checkbox.
  - Check the EXCLUDE box for one or more parts.
  - The parts will be treated as if they are not in the estimate for all calculations and reports.
- You can run Estimate Group Reports from the New menu.
  - Refer to the *Setup and Administration Guide* and search for the section *Customizing the 'New' Files Menu* and the sub-section *Designer and Estimate Reports* for information about adding a menu item for running reports.
  - Use the new <EstimateGroupReports> tag in place of the
     <EstimateReports> tag to specify the reports to run.

# **Release 5.0.538**

November 21, 2019

# **Core Module**

- There is a new utility for comparing Excel files.
  - Use SHIFT+CLICK to select two (and only two) Excel files in the *Files* tab, rightclick, and select COMPARE EXCEL FILES.
- The *Expression Language Guide* has been updated.
  - There is a new parameter to the <u>*ColumnTotal*</u> function to filter the rows being included.
  - There is a new format for merging data together as a single string, called *String Interpolation*. Refer to the Guide for more detail.
- The ADMIN→USERS AND LICENSES form now has a search box on both the Users and Licenses tabs.
- The Submittal Generator's *Header* and *Footer* properties (*Text*, *Font*, and *Images*) are now overridable at each level of the submittal.
- The Network Tree AS-P device now has a *Third Party Bus* option on COM A and COM B.

# **Design Module**

- The installed Designer Visio stencils are now compatible with 64-bit versions of Visio.
- The .vsdm file format for Visio Designer drawings is supported.
- There is a new *SE Special Pricing Order Form* report for requesting special pricing for a project from Schneider Electric.
- The *Find and Replace Utility* has been updated:
  - It will now list the *Typical Of* shapes when searching by the *System Name* column, which allows you to change the system name displayed in these shapes.
    - Changing the displayed System Name does not set the *Typical Of* value for that system. A new system will default to *Typical Of* 1.
  - There are more options to edit values when searching on Part Numbers
    - Check the SHOW PART COLUMNS check box to display the current values for *Quantity*, *Description*, *PDF*, and *Custom Cost* in the table, along with the values from the Part Database.
    - Right-click on one or multiple parts to edit the *Quantity*, *Description*, *PDF*, or *Custom Cost* values.
- Panel Shapes linked to parts will now inherit and display accessories from the parent part and carry them forward onto the Bills of Materials.
- The Page Wizard has an option to use the File Name field in the Title Block without the file extension.

- On the Part Properties *Detail Images* tab, you can right-click on a detail record and select *Preview Image* to view the image that will be used.
- The SEZ8250 shape is now available in the SE Room Controllers stencil.
- The *SE SmartStruxure* RP-C controller shapes will now display the *Software* tab when viewing their Part Properties.
- The *Smartware Technologies* stencil now contains shapes for the new Universal Unitary Power (UUP) Panel.

- There is a new *SE Special Pricing Order Form* report for requesting special pricing for a project from Schneider Electric.
- There are new reporting Data Sources and fields
  - There are new Data Sources for *Subcontract Notes* and *Expenses Notes*.
  - There is a new Data Source, *PartsByPartNumber*, that contains one row for each distinct Part Number in the Estimate, along with the *Total Quantity* for the Estimate.
  - The Service Estimate's *Equipment* table now includes the *Notes*, *BeginCoverageDate*, and *InstallDate* fields.
  - The Service Estimate's *EqAndTasks* table now contains the *TaskGroup* field.
- Word Reports can use a new Data Source and a special report tag to generate a bulleted list of Areas and Systems.
  - Refer to the new sample report *Systems Bullet List.docx* for details and examples
- In SE Global Mode, when selecting device parts for a point, you can choose to add a new instance of an existing part by selecting the specific *Add Another PART NUMBER* option.
- The Estimate Node now contains *Estimate Prepared By* and *Estimate Prepared By Phone* properties.
- There is an additional *Note* field for the *Risk* value on the *Other Costs* tab of System and Area nodes and the *Expenses/Allowances* tab of an Estimate.

# Software Module

- There is a new feature that lets you compare two versions of a WorkPlace Tech application file to find differences between blocks, connections, and properties.
  - Use SHIFT+CLICK to select two (and only two) WorkPlace Tech files in the *Files* tab, right-click, and select COMPARE WORKPLACE TECH FILES.
  - You can compare a version exported from a controller with a formatted version that may or may not be current. The results will indicate how to update the formatted version to match the current.

#### **Prometheus Module**

- The *Prometheus User's Guide* has been updated.
- All users now have the option to download Prometheus Systems.
  - Go to TOOLS $\rightarrow$ OPTIONS $\rightarrow$ LOCAL FILES and click DOWNLOAD OPTIONS.
- Prometheus schedule templates are now distributed from Schneider with the associated Prometheus Systems.
- There is an option while developing a Prometheus Template to check for design errors.
  - In the Schedule Editor, click CHECK PROMETHEUS TEMPLATE FOR ERRORS.

#### Reporting

- For Word Reports, the FlexWord option can now be turned on or off. This option greatly speeds the generation of the reports and does not use Word to create them.
- Reports can be generated to .CSV files for importing into iPortal or accounting systems.
  - On the *Reports* tab, under *Options*, select SAVE EXCEL REPORTS TO CSV.
- The Data Source Viewer has a new feature for testing and evaluating expressions.
- You can now use expressions as field codes in Excel and Word reports.
  - For example, you can use  $\langle Quantity * NetCost \rangle$  as a field code in Excel, instead of creating two separate cells with  $\langle Quantity \rangle$  and  $\langle NetCost \rangle$  and a third column to multiply them using an Excel formula (= D2 \* F2)

#### Parts Database and Multi-File Libraries

• When managing MFLs, you can multi-select libraries to *Delete* or *Submit for Approval*.

# **Release 5.0.537**

July 23, 2019

# **Core Module**

- The *Reports* tabs now has an option to show file extensions for the report templates.
- The Security Expert devices are now available in the Network Tree.
- The RPC and IP-IO devices are now available in the Network Tree in the *SmartStruxure* stencil.
- In an Enterprise environment, it is now possible to do a remote login to a server in a different enterprise account family.
- The Smartware support email address, phone number, and physical address are now all in the HELP → ABOUT screen.

#### **Design Module**

- The Find and Replace Utility has been updated:
  - You can now select specific pages of a drawing to search, instead of just the current page or all pages.
  - When finding System Names, there is a checkbox to INCLUDE BOM SHAPES in the results.
  - Updating a shape's Part Number will now cause the shape to redraw, when appropriate.
  - Updating a shape's *BOM Tag* will now update linked Panel Shapes.
- The *Security Expert* stencil is now available.
- The outputs on the i2804/b3804 controller shape have been updated.

#### **Estimate Module**

- You can now add or hide Labor codes in an Estimate Model and the Parts Database
  - Refer to the new section on *Using Custom Labor Codes* in the *Estimate Module User's Guide* available on the HELP menu.
- There is a new tool for creating a simple Designer drawing from an Estimate.
  - Right-click a node in an Estimate and select TOOLS → GENERATE DESIGNER
     DRAWING. A simple drawing with shapes found from the available part numbers will be generated.
- The *PM Hours Worksheet* has been updated:
  - You can now calculate PM Hours as a percent of Itemized Material and Expenses, in addition to the Subcontractor costs.
- You can delete multiple points from the System's Point List through the right-click menu.
- When using *Use Point List Mode 2* (see *Release 5.0.536*):
  - Points that are already in use will be shown with an asterisk after them.
  - When adding a part, there is an option to select a part using the Valve and Actuator selector.

#### Parts Database and Multi-File Libraries

- For Schneider Electric Branches and offices that do not use List Price, you can adjust the views in the Price Lists to show only the Branch or Net Price.
  - In TOOLS  $\rightarrow$  OPTIONS  $\rightarrow$  PARTS DATABASE, there is an option to HIDE LIST PRICE; USE NET PRICE. This will remove all List Price columns from the Parts and Estimate screens.
- When inserting a System node from an MFL, you can right-click on it and select VIEW FILE. The System node will then be displayed in a Package Viewer.
- Packages have been updated to include and display the Subcontractor and Summary tabs.

#### **Function Block Editor Module**

• Added support for editing Function Block programs from an EBO 3.0 workstation.

# **Release 5.0.536**

May 13, 2019

# **Core Module**

- The Submittal Generator now allows for custom headers with text and images:
  - There are three new fields available on the Submittal Document's *Properties* tab to specify the text and properties to show for the left, center, and right portions of the header. They work similar to the footer and use the same font control.
    - Refer to the Release Notes for version 4.0.528 for details on the header and footer format codes.
  - The header and footer can now specify many additional properties of the project it is referencing with report field tags, such as <ProjectName>.
    - These values come from the project node (*Customer Site, Job, Estimate*, or *Design Project*) that the submittal document is contained in.
    - Use the VIEW→PROPERTY NAMES menu item to see the names of the properties on the project's *Properties* tabs.
  - There are three new fields available on the Submittal Document's *Properties* tab to specify an image for the left, center, and right portions of the header.
    - To use an image, copy it to the *Files* tab of the Submittal Document node.
- When defining Custom Properties for project nodes (i.e., those shown on the *Custom* subtab of a *Customer Site*, *Job*, *Estimate*, or *Design Project* node's *Properties* tab) you can now specify that you want the value's textbox to be multi-line.
  - In the Custom Value Name field (e.g., Custom Value Name 1), include the code "[M]" at the end of the name (e.g., "Salesperson's Notes [M]"). The associated Custom Value field will then be displayed multi-line.
  - If using a custom property name, add the [M] after it (e.g., "Salesperson's Notes <SalesNotes> [M]")

# **Design Module**

- You can now use .vsdm files as Visio drawing files.
  - You cannot use .vsdx files, as they do not allow macro code.
  - If you use SAVE As within Visio to convert an existing .vsd file to .vsdm, you will need to mark it as a Designer Drawing (right click→MARK AS DESIGNER DRAWING) and then reopen it to continue to edit it.
  - The .vsdm files are more compact and more stable as they get larger, but otherwise they function and perform similarly.

- There is a new Data Source for reports, *PartsByPartNumberAndSystem*, that can be used in reports by system that need to show a list of Part Numbers and their quantity within that system.
- The *ControllerPoints* data source has two new columns, *PointPartDescription* and *PointPartDescriptionShort*, which are the descriptions of the associated sensor or device.

#### **Estimate Module**

- The checkbox in the Estimate Settings to enable the new Point List mode introduced in Release 535, has been renamed to *Use Point List Mode 2*.
  - There is another checkbox to Use SE Global Mode, which also sets this mode and other related options.
- There are new features that allow you to import data from PDF files marked up in Bluebeam Revu.
  - There is a new *Smartware Studio Bluebeam Import Guide* available from the Help menu.
- You can now calculate additional Labor Hours as a function of PM hours.
  - The Labor Codes table in the Estimate Model now has columns for *Hours from PM Factor* and *Min Hours from PM*.
  - The number of PM hours is multiplied by the factor to determine how many additional hours of that labor type will be added.
  - If that calculated amount is less than the *Min Hours from PM*, the minimum will be added instead.
- The *Itemized Expenses* have been renamed *Itemized Costs* and the associated tabs have been reorganized a bit:
  - At the System and Area levels, *Itemized Costs* and *Risk* are both found under the *Other Costs* tab
  - At the Estimate Level, *Itemized Costs* is a tab under *Expenses*
  - Other labels and form controls now refer to *Itemized Costs* instead of *Other Expenses*.
- You can now categorize subcontracts with *Subcontract Codes* 
  - In the Estimate Model (found under ESTIMATE SETTINGS), on the *Subcontracts* tab, there is a new table of *Subcontract Codes* and *Descriptions* available to edit.
    - You will need to also check the USE SUBCONTRACT CODES checkbox.
  - When using this mode, the Subcontracts tabs in the estimate will hide the Labor Code and display a column for Subcontractor Code and Description.
    - Subcontractor Code will automatically fill in the Description.
- The Labor Codes table in the Estimate Model now has a new *Efficiency* Factor column.
  - In a System's *Labor / Labor Adjustment* Tab, you can check the *Is Efficient System* checkbox in the top right. This will add (or remove) an *Efficiency* row and multiply each labor factor by the Efficiency Factors from the model.

- The *Block Labor Hours* on the Estimate Node have been enhanced from two fixed rows of regular and overtime hours to a fully customizable set of rows, allowing you to change the description, set overtime per row, and add or remove rows.
  - You can also set the *Quantity* for the row.
- Labor Items at the System level under the Labor tab now have a *Quantity* column.
  - Labor factors are multiplied by the quantity, taking into account the System's *Typical Of* value and the *Not Typical* checkbox.
  - Block Labor Hours at the Estimate level also have the Quantity column.
- There is a new tab on the Estimate called *Controllers*. This tab shows a list of all the controller parts in the Estimate and allows you to synchronize this list to a set of devices on the Network Tree.
  - There are two lists of controllers shown: the ones found in the Estimate and the ones found in the Network Tree.
    - You can filter the Network Tree list to search all devices or only the devices in a specific Network Tree folder.
  - Each list will indicate if there is a match for the controller in the other list. This is show in the *Matched* column.
    - Click CREATE MISSING NETWORK TREE DEVICES to create any missing devices in the Network Tree.
    - If there are multiple controllers with the same name, they will be unmatched. You can select a different Network Tree folder if that will help resolve the conflict. Otherwise you will need to rename one of the controllers and keep the names unique.
- There is a new Data Source for reports, *SystemComments*, that includes all the comments from the Comments tabs of the systems in the Estimate.
- The *EqAndTasks* Data Source for reports now includes columns for *Intro Description*, *Special Rules, Begin Coverage Date*, and *Install Date*.
- You can now distribute reports for Estimate Groups through the *Reports*\*Estimate Groups* folder in the Studio resource folder.

#### **Prometheus Module**

- Added *Enable* condition to Question Groups.
- Fixed issue where a long *Group Name* was word wrapped for smaller sized groups.
- Added *Value Type* property to Variable questions to explicitly specify the result type of the variable.

#### Reporting

• When creating Report Groups, you can now specify a custom file name to use for the output report. By default, the output file name is the same as the Report Group's .xml file name.

```
<ReportGroup FileName="Custom Report Name.xlsx">

    <Reports>

    <Report>Estimate Summary.xls</Report>

    <Report>Material List (By System).xls</Report>

    </Reports>

</ReportGroup>
```

# **Release 5.0.535**

March 22, 2019

# **Core Module**

- You can now set the Region in TOOLS→OPTIONS on the Workstation tab. This setting affects how numbers, currency, and dates are displayed within Studio. It does not affect text.
- The Submittal Generator File Node now converts .docm, .xlsm, .vsdx, and .vsdm files.

# **Estimate Module**

- The *Estimate Summary* report has been updated to support a number of the new features listed below. If you have a customized version of this report, we strongly recommend you reapply your customizations to this new version.
- There are a number of new features relating to the System's Points tab:
  - There is a new mode (*Use Point List Mode 2 SE Global Points Mode*) that presents a simpler interface for entering point information.
    - It is enabled in the Estimate Settings, on the *Other* tab (check the USE POINT LIST MODE 2 USE SE GLOBAL POINTS MODE box).
    - When selecting the point type, it does not show the *Category* (Hardware or Software) or *Connection* (Physical Connection Type) columns, instead offering a subset of standard point types.
    - It shows new columns for *Device Part* and *Controller Point*. These lists populate based on the part on the *Parts* tab and include options to add parts on the fly.
  - You can now specify the *Quantity* of a Point.
    - Previously this was only possible when the System was *Typical Of* and the Point was marked *Not Typical*.

- There is a new FIND CONTROLLER button on the bottom half of the *Points* tab.
  - When you click it, it takes you to the Parts tab and automatically filters to controllers that have at least enough points to cover the amount specified on the *Points* tab.
- For *Subcontracts*, there is now an *Included* checkbox at the System and Area levels to help control which subcontracts are included in the Estimate.
- For *Travel Expenses*, you can now change *miles* to *km* (or any other unit) from the Estimate Settings on the *Expenses/Travel* tab.
- For *Risk*, you can now choose to specify a fixed dollar amount instead of a percentage of the total cost for the System, Area, or Estimate.
- For individual *Expenses*, you can now add items with custom markups at the System, Area, or Estimate level.
  - There is a new *Itemized Expenses* list on the *Expenses* tabs of each node. As with subcontracts, these items can be individually included, will roll-up from systems to areas, and can be individually marked up.
- There is a new option in Estimate Settings on the Other tab to FIX THE MARGIN at a certain percentage and not let it be changed from the Estimate *Summary* tab.
- For Service Estimates, you can now add Block Material with custom markups at the System, Area, or Estimate node like Subcontracts
  - There is a new *Block Material* tab on each node. As with subcontracts, these items can be individually included, will roll-up from systems to areas, and can be individually marked up.
- The Labor Model now allows for additional calculations
  - You can specify some parameters to calculation an adjustment for Shift Differentials.
    - On the Labor Settings *Labor/Other Labor Options* tab you can specify that there are two or three shifts, and what the additional percentage cost is for the second or third shifts.
    - These additional costs are aggregated and shown as a single value on the Estimate Summary tab and report.
  - You can now calculate the *Cost Rate* for each Labor Code based on Base, Fringe, and Worker's Comp amounts
    - On the Labor Settings *Labor/Other Labor Options* tab you can select to CALCULATE THE LABOR COST RATE FROM BASE + FRINGES. When enabled, the addition columns will appear on the *Labor Codes* tab.
    - Fringes and Worker's Comp can be calculated based on factors (select CALCULATED FRINGES and specify Fringe Rate Factor and WORKMAN'S COMP FACTOR), or you can specify individual custom amounts in the Labor Code table (select CUSTOM FRINGES).
#### **Function Block Editor Module**

- The *Function Block Editor Guide* has been updated.
- Library blocks can now be converted to HFBs in-place.
- Added advanced copy-paste options that allow copying HFBs between instances of Visio.
- Added additional WorkPlace Tech library block implementations, including:
  - Interlock, Loop Single, Ramp, Interstage Delay
- Fixed various WorkPlace Tech library blocks to more closely match the behavior of the original blocks:
  - o Dual Delay, Dual Minimum, Minimum Off, Minimum On, Off Delay, On Delay

# **Prometheus Module**

- Added caching feature for users to use the faster Visio document generation engine.
  - For source documents stored as .vsd, it converts the file to .vsdm as necessary.
  - Uses the .vsdm file for generation
  - Saves the generated final drawings as .vsd for compatibility.
- Added a feature to the Prometheus Preview in the Developer window to show Current Responses for the system.
- Added new Question types: *Date*, *Time*, and *Nested Prometheus* System
- Fixed padding issue on Question pages between the group boxes and their first item
- Fixed auto-width calculation for combo boxes on the Question Pages inside the Prometheus Runner.
- Moved the GENERATE ALL DOCUMENTS menu item to a button at the top of the schedule.
- Added two Prometheus Developer menu items to Generate Word/Excel Documents and Generate Visio Drawings to the context menu in a Prometheus schedule row.

# Reporting

- There are a number of updates to the newer Excel report generation to account for less common Excel features found in some user-generated custom reports.
  - Printable area, formatting for multiple sheet reports, handling zoom, enabling *Hide if Zero*, allowing to save as xlsm, not forcing gridlines in print, hiding of first row, and others.
- The Reporting Tab has a USE FLEXCEL checkbox. If you experience problems with a specific report, try unchecking this box to use the older engine. Please report any features not supported by the new engine to Smartware.

February 4, 2019

# **Core Module**

• Enterprise Admins can now edit a Studio user and add them to multiple remote servers and user groups at once.

# **Designer Module**

• The Reports tab now has an option to RUN REPORTS SEPARATELY FOR EACH FILE. With this option, each selected report will be run once for each Visio drawing file selected for reporting, showing only the data from that drawing file. The generated reports will be saved in the same folder as the associated drawing file.

#### **Parts Database**

• When updating parts with the UPDATE EXISTING PARTS tool, you can now change the Part Number if the *PartUID* is also available as a column in the spreadsheet being imported.

# **Prometheus Developer Module**

- Added *Override Description* option for Parts, so that the Prometheus Part Description will take precedence over the actual Part Description in the Parts Database.
- There is an updated version of the *Prometheus Developer Module* guide

# **Prometheus Module**

- Resolved a problem where Cost Multiplier was incorrectly calculated and displayed in the Parts tab.
- Resolved a problem where orphaned Prometheus *Parts*, *Points*, and/or *Labor* items remained after removing a Prometheus System from node.

# **Function Block Editor Module**

- Added program validation so it warns if the Function Block compiler will reject the program, either on demand or during SAVE TO AUT FILE.
- Added additional WorkPlace Tech library block implementations, including:
  - DUI Expander, Fan Speed, Clocked SR, Filter, SR Flip-Flop, Binary Encoder, Control Override, Demux Select, Dual Minimum, and Event Indicator
- Added WorkStation controller import generator for WorkPlace Tech conversions.
- Updated WorkPlace Tech conversion inputs and outputs and added BACnet support.
- Fixed issue where editor may crash when block properties are open for an extended period of time when launching from WorkStation.

January 8, 2019

#### **Core Module**

- In the *Files* tab, you can now open multiple files at the same time. Select the files, right-click, and select OPEN.
  - You cannot use OPEN WITH with multiple files.
- For Enterprise companies and Family Admins, you can now add a user to multiple remote servers at the same time. Right click on the user and selected CHANGE REMOTE ACCESS.
- When searching for folders, you can now also search by *Folder ID Number*.
  - Folder IDs are visible when you select the VIEW $\rightarrow$ FOLDER ID NUMBERS.

#### **Designer Module**

- There is a new version of the *SmartStruxure IO Points* report for cases where there is more than one AS, each with its own set of I/O devices. In these cases, one worksheet will be generated for each AS in the drawing.
- The Designer shape for the EcoStruxure Living Space Sensor (LSS) calculates its required cover part as an accessory. This accessory did not automatically have the same quantity as the sensor itself. This has been fixed.

#### **Estimate Module**

• There is a new field in the *Globals* Data Source, *ExpensesTripCountTotal*, which represents the total of the *Total Trips* row as show in the *Travel Costs By Labor Code* table on the *Estimates Expenses/Travel* tab.

#### Reporting

- You can add additional filters and sorting to existing Data Sources.
  - Add a new <DataSource> section in the <x> section at the bottom of the report. The new Data Source can reference the original data source by name and add a new <Where> attribute to filter it further.
  - Consider this example:

- The original report will have other sections that reference the built-in Data Source Parts (e.g. <D DataSource="Parts">).
- The new Data Source being defined is *PartsFiltered*. It will take the data from Parts and add the new filter. You can then modify a copy of the report and change the references to *Parts* to *PartsFiltered*.

<D DataSource="PartsFiltered">)

#### **Software Development Module**

- The *Function Block Editor* has been updated:
  - Added support for Visio text boxes to be used as comments
  - Added padding on top and left when exporting programs to AUT format
  - Added support for copying and pasting HFB and HFBIOs
  - Fixed MUX blocks having swapped labels
  - Fixed HFBIO identifier renames not properly updating parent HFB
  - Fixed page auto-expand for VSDM converter

# Release 4.1.532

December 13, 2018

#### **Core Module**

- The RECENT PROJECTS and FAVORITE PROJECTS lists can now distinguish between two projects of different types that have the same name (e.g., a Job and Customer Site). These menus also now show the icon for the project type.
- In the ADMIN→USERS AND GROUPS menu, you can now right-click on a user to copy their email address to the clipboard.
- Opening a shortcut to a Studio project that is already open in another instance of Studio will no longer generate an error.

- The Print Manager now has an option to SAVE SEPARATE PDFS PER DRAWING that will create and add a PDF file next to each Visio drawing in the Systems folder, with the same name.
- The Controller Points data source now includes the *PartLocation* field.
- The Current Sensor shape's symbol now resizes with the sensor if the tags are particularly long.

#### **Estimating Module**

• There was a rare case where a Subcontract existed on both the Estimate node and a System node when the Labor Code and Vendor Code were the same, that the rolled-up subcontract amount could overwrite the subcontract amount in the Estimate node. In these cases, opening the Estimate will notify you of a possible calculation change, which you can review before accepting.

#### **Management Module**

• There are numerous improvements to the Job and Quote Tracking features.

#### Software Development Module

- The *Function Block Editor* can now use the new .vsdx format if you are using Visio 2013 or higher, which dramatically speeds up the conversion process.
- The new Library system is in place with several Smartware library blocks and partial support for the WorkPlace Tech block library.
- Refer to the updated *Function Block Editor User's Guide* (available from the Help menu) for full details.

# Release 4.1.531

October 10, 2018

#### **Designer Module**

• When importing or updating devices from Designer to the Network Tree, it now brings in point information as well.

#### **Software Development Module**

• The *Function Block Editor* now supports WorkPlace Tech-like Tags. Refer to Chapter 6 of the *Function Block Editor User's Guide* on the HELP menu.

#### **Parts Database**

• There is now support for SE Canadian Partner pricing. Please contact Smartware Technologies for more information.

September 19, 2018

# **Core Module**

- It is now easier to open the Windows File Explorer view of a node in your project.
  - Right-click on the node or the empty area of the *Files* tab and select OPEN FOLDER IN FILE EXPLORER.
- There is an updated version of MPV VAV schedule.

# **Estimating Module**

- The reports generated on the *Reports* tab will now run considerably faster, and does not require Excel to be installed in order to create reports or generate PDFs.
  - Excel is still required to view or edit the reports in their native Excel format.
- When working with controller parts, the physical point count features now account for the UIAO (AI/DI/AO) points available on the new EcoStruxure controllers.
  - The Part Browser filters
  - The Physical Points shown on the Parts List
  - The Summary of Physical Points on the Points tab of the Systems, Areas and Estimate.

- There is a new Designer shape for the Xenta 122 controller.
- The reports generated on the *Reports* tab will now run considerably faster, and does not require Excel to be installed in order to create reports or generate PDFs.
  - Excel is still required to view or edit the reports in their native Excel format.
- The root Designer node has a new tab that shows a list of all of the controllers in the Designer project, allowing you to create and sync them to device nodes in the Network Tree.
  - There are two lists of controllers shown: the ones found in the Designer drawings and the ones found in the Network Tree.
    - You can filter the Network Tree list to search all devices or only the devices in a specific Network Tree folder.
  - Each list will indicate if there is a match for the controller in the other list. This is show in the *Matched* column.
    - Devices need to be matched or created explicitly on this tab.
    - If the devices already exist in the Network Tree, click the MATCH EXISTING NT DEVICES BY NAME AND PN button to match the devices from the Designer drawings to the ones in the Network Tree.
      - The devices must have the same BOM Tag and Part Number to match one another.

- If the devices do not yet exist in the Network Tree, click CREATE MISSING NETWORK TREE DEVICES.
  - The devices will be created in the Network Tree folder selected for filtering.
- If there are multiple controllers with the same name, they will be unmatched. You can select a different Network Tree folder if that will help resolve the conflict. Otherwise you will need to rename one of the controllers and keep the names unique.
- You can copy specific properties from the drawing files to the Network Tree devices, and vice versa.
  - Select the direction to update from the *Update* list, check the *Selected* box for the individual controllers you want to update, then click the UPDATE button.
  - When updating the Network Tree from Design Drawings, you can only update the *Device Address* properties.
  - When updating the Device Drawings from the Network Tree, you can update the *Device Address* properties and/or the *From/To Device* properties
    - The From/To Device values are based on the relative positions of the devices in the Network Tree. The From Devices is generally the previous controller in the tree (excepting the first device), and the To Device is the controller that follows it.
    - Only the main communication bus (BACnet, Lon) can be updated this way.

#### **Parts Database**

- You can now specify custom Vendor information for a part in the standard database.
  - When editing a part in the Part Database Manager, there is a new *Custom Vendor* tab where you can choose a new *Vendor* and specify the *Vendor Part Number*, *List Price*, *Discount Code* or *Individual Discount Multiplier*, and *Price as of Date*.
  - This feature does not apply to parts added by your Company or by a User, as the main Vendor is already specifiable by you. It is also not available for Users to override the vendor for any type of part, as it can only be done through the Part Database Manager by a Parts Database Administrator.
- When using the Part Browser for controllers, the filters now account for the UIAO (AI/DI/AO) points available on the new EcoStruxure controllers.

#### **Network Tree**

• The Tridium JACE 8000 can now import devices from an N4 station.

#### Software Development Module

• The *Function Block Editor* now works with EcoStruxure Workstation 2.0 and 1.9.

#### **Prometheus Module**

• There is an updated version of the new *Prometheus Developer* Module

# Release 4.1.529

August 7, 2018

#### **Core Module**

• The JACE 8000 Network Tree device now allows ASD devices on its COM ports.

#### **Design Module**

- There is a new stencil for boards and digital point cards manufactured by Smartware Technologies. This stencil contains Designer shapes for:
  - The 24V-2CH, 24V-5CH, and 120V-2CH power distribution boards.
  - The IORET-33 common/return board.

#### **Estimating Module**

- There is a new report checkbox option that allows you to exclude parts from an itemized material report if the Quantity of that part is zero.
- There are two new reports, *Point Detail List (By Area)* and *Point Detail List (By Area, with Counts)*.
- The *Point Detail List (by System, with Counts)* report has been updated to include Terminal points in the counts.

#### Software Development Module

• There is a beta version of the new *Function Block Editor*.

#### **Prometheus Module**

• There is a beta version of the new *Prometheus Developer* Module.

July 9, 2018

# **Core Module**

- The Submittal Generator now allows for custom footers:
  - There are three new fields available on the Submittal Document's *Properties* tab to specify the text for the left, center, and right portions of the footer.
  - The text can include the following field codes that will be filled in when the submittal document is generated:
    - <Page> The current Page Number
    - <Pages> The total number of Pages
    - <Date> Today's date.
  - You can merge text and fields together, as in:

Page <Page> of <Pages>

- You can also control the font used for the footer with the new *Document Footer Font* property.
- You can also reference the new *Revision Number* property in the footer using the *<RevisionNumber>* field code
- The *Total Pages* value will be incorrect if you use the *Reset Page Numbering* property in any of the sections.
- These new properties override the use of the older *Add Page Numbers to Bottom* of *Each Page* and *Location of Page Numbers* properties, which are still available.
- There is a new VAV SmartChart Schedule that is specific for the MP-X VAV controllers.
- There is a new Property Sheet report for *Systems*.

# **Design Module**

• The shape for the new EcoStruxure *Living Space Sensor* now includes a selector to choose a cover as an accessory based on the required features.

# **Release 4.0.527**

June 12, 2018

- The Schedule nodes have new options for filling in data available from the right-click menu.
  - FILL DOWN (also available as CTRL+D) copies the value from the topmost cell in each selected column into all the selected cells beneath them.
  - FILL SERIES brings up a window that lets you fill the cells based on a pattern (e.g. "VAV#" to create VAV1, VAV2, etc.). You can specify the starting value, step value and ending value.

- Some issues related to using higher DPI settings caused problems in the Schedule filter panel. This has been resolved.
- On the Valve and Actuator selector, the *Actuator Torque* Filter has been changed to and explicit minimum and maximum range (instead of a percent above and below a specified value).

#### **Design Module**

- You can now Export and Import software points on the controller's Software Points tab.
- The Find and Replace Utility has been updated to remember the last search.
- The AccessXpert stencil now includes a shape for the AX-1501.
- The *EcoStruxure* controller and sensor shapes have been refreshed.
- The *PartsByPartNumber* data source for reports now includes a column called *BomTagList*, which lists all the *BomTag* values for the rolled up parts for each part number.
- Some older shapes were not responding to a double-click in Visio 2016. These have been updated.
- There were cases where copying an existing *Schedule Chart* shape that was already populated would not allow you to change the copy to point to different schedule data. This has been resolved.
- Some issues with the *Terminal Block* shapes have been resolved.

# **Estimate Module**

- There is a new report, *Point Detail List (By System, with Counts)*, that adds counts for AI, DI, AO and DO points to the report.
- The Data Sources for *qryParts* and *qryPartsBySystem* now include the *BomTag* field.

# **Release 4.0.526**

May 7, 2018

- The Smartware Studio User's Guide has been updated.
- When adding an Estimate, Job or Designer project node to an existing project, you will now see the New Project form that allows you to choose a Template PROJECT TO DUPLICATE (as you would when creating an Estimate, Job or Designer Project).
  - The nodes, folders and files from the Template Project will be inserted into the existing project.
  - $\circ$   $\,$  For Estimates, you can also choose the Estimate Model to use.
- The Background Updater has additional options for when the Updater will automatically close and when it will show notifications from the system tray.

- You can access these settings from TOOLS  $\rightarrow$  CHECK FOR UPDATES  $\rightarrow$  OPTIONS or from TOOLS  $\rightarrow$  OPTIONS  $\rightarrow$  LOCAL FILES  $\rightarrow$  DOWNLOAD OPTIONS.
- The Bus nodes now have a property for *Include Terminator*. Setting this will show, on a generated Automation Overview diagram, that a Terminator should be added to the bus.

#### **Estimate Module**

- The *Estimating Module User's Guide* has been updated.
- When adding an Estimate node to an existing project, you will now see the New Project form that allows you to choose a Template PROJECT TO DUPLICATE (as you would when creating an Estimate Project).
  - The nodes, folders and files from the Template Project will be inserted into the existing project.
  - You can also choose the Estimate Model to use.
- On the *Subcontracts* tab, when adding subcontracts, there is an option to calculate the subcontract amount as the product of a *Unit Quantity* and a *Cost per Unit*.
  - For example, the units could be *network runs*, the *Cost per Unit* would be the cost of a single run installed by the electrician, and the estimator can just fill in the number of runs as the *Unit Quantity*.
  - Check the SHOW UNIT COST COLUMNS TO CALCULATE SUBCONTRACT AMOUNT checkbox to view these two columns.
  - If you enter values for both, the *Subcontract Amount* will be calculated and frozen. To be able to enter the *Subcontract Amount* directly again, clear the *Unit Quantity* and *Cost per Unit* columns
- If you sort the parts on the *Parts* tab, they will now retain that order.
- The *Summary* tab for Areas and Systems has been updated.
  - It includes the Description property.
  - $\circ$  It has a new table summarizing and totaling the costs of the system or area.
  - The layout has been improved.

# **Release 4.0.525**

April 21, 2018

- There are improvements to how the Parts data is loaded in the background.
  - There is a new option on the TOOLS  $\rightarrow$  OPTIONS *Parts Database* tab that allows you to avoid loading obsolete parts into memory.
  - This will speed up the loading of parts data, but may have an impact in cases where Studio Designer or Estimate needs to look up obsolete parts. In these cases, uncheck this option and restart Studio.

- You can now import devices from an EcoStruxure station onto the Network Tree of a Studio project.
  - The import is done separately for each bus. You can import BACnet, LON and Modbus devices.
  - Right-click on a parent node containing devices (e.g. *IP Network*) in the EcoStruxure station and select EXPORT. Choose the *Export* option and click EXPORT.
  - Save this file and copy it to the *Files* tab of an AS or other EcoStruxure device.
  - Go to the *Import Devices* tab of the AS, select the exported file, and click IMPORT DEVICES.
- Three Tridium JACE 8000 expansion modules have been added to the network tree: LON, RS-232, and RS-485
- In the network tree, the Ethernet-based BACnet MP devices now also allow BACnet IP buses to be their parents.
- Issues with the Assign Bulk Permission Sets to Folders utility have been resolved.

- The Project Property Label shape has been enhanced. It can now link to a Visio *Page Name* (the text on the Visio Page tab) or to a Title Block's *Page Number* or *Page System* value.
  - The label will update automatically when the Title Block or the Page Wizard changes the linked value.
- The BOM shape has been updated to support different font sizes.
  - Use the *Font Size* selector on the Home ribbon or the shape's FORMAT $\rightarrow$ TEXT menu command.
- There is now a menu command in DESIGNER TOOLS to UPDATE ALL PANEL SHAPES for when the automatic updates of Panels are turned off.
- The Terminal Block shape has been updated
  - The bracket symbol can now be repositioned separately
  - There are new terminal parts for non-part blocks.
- The Controller Points data source now includes the Visio File Name
- The Error Checking Options now has SELECT ALL and DESELECT ALL buttons.
- There were sometimes long delays when deleting Schedule rows and nodes. This has been fixed.
- The automatic updating of Panel shapes when multiple devices are moved manually has been improved.

#### **Estimate Module**

- Estimates and Areas have two new right-click menu commands:
  - TOOLS  $\rightarrow$  SET TYPICAL OF FOR SYSTEMS will set the *Typical Of* values for all the systems beneath the selected Estimate or Area to the same specified value.
  - EXPORT→EXPORT ALL SYSTEMS AS PACKAGES TO MY PACKAGES will convert each system beneath the selected Estimate or Area into a package and add them to the user's local package list.
- There are changes in how Part Packages display and update pricing and labor factors:
  - When you edit Part Packages from the Parts Database Manager or TOOLS→PARTS→MANAGE MY PACKAGES, it will now show the existing pricing and labor. It had been showing updated pricing and labor for any parts in the database that had been updated.
  - When you browse Part Packages to add to an Estimate, you now have options to view and add Packages with or without updating pricing and/or labor, or swapping out obsolete parts.
- The Parts Data Source now includes the *BomTag* as a column.

# **Release 4.0.524**

February 18, 2018

# **Core Module**

- The TOOLS→SCAN FILES utility available on the Network Tree has a new option to scan any available WorkPlace Tech files and populate the devices' *Device Points* tab.
  - You can then use the Device Points tab on a parent controller or the entire Network Tree to get a list of all the points.
  - This report can be exported to Excel and used to get an aggregate point count of a network.

- There is a new option when running reports that allows you to exclude parts that are marked in the drawing as *Is Existing*.
- Previously, only Schedule Chart shapes being used as a SmartChart would indicate if the Schedule data had been updated in Studio such that the Chart needs to be update in the drawing. This will now occur for all Schedule charts.
- In the DESIGNER TOOLS→FIND AND REPLACE Utility, I/O Points were not appearing in the shape list. This has been resolved.

February 6, 2018

# **Design Module**

- When Designer drawings were scanned into the Project Database and System Tree nodes, linkable shapes (e.g., Panel shapes and Floorplan shapes) that were linked to other existing parts were coming in incorrectly.
  - The linked shape created a new instance of the part. They now are ignored for the purposes of the Bill of Material list.

# Release 4.0.521

January 19, 2018

# **Core Module**

- There are Network Tree devices available for the new SmartX controllers and sensors.
  - They can be found in the SmartStruxure Network Tree stencil.
- There are some updates to the Generate Automation Overview tool on the Network Tree.
  - You can now control the spacing between devices in a row by changing the *Devices per Row* parameter.
  - Larger BOM Tag and Part Number text will now wrap and resize to fit.
- There were issues opening Work Place Tech files with WorkPlace Tech 5.9 due to updated security settings. This has been resolved.

- There are Designer shapes available for the new SmartX controllers and sensors.
  - They can be found in the SmartStruxure stencil.
  - The pricing information is not yet available. The Part Database will be updated as soon as it is.
- The Schedule Builder now lets you specify some of the parameters used by the Designer Schedule Chart shape in the Schedule's template itself.
  - This saves the time of configuring the Schedule Chart shape manually and lets you save the properties with your Schedule templates.
  - The properties that can be set include *Text Alignment*, *Text Wrapping Style* and the *Column Width*
- There is a new shape in the Sensors and Transmitters stencil called *Find a Sensor*.
  - Drag this onto a drawing and double-click to select from a list of available sensors.
  - Once selected, the appropriate sensor or combo sensor shape will appear configured for that part number.

- The Sensor shape has a new option that will prevent the Shape Configuration properties from being changed when a new Part Number is selected.
  - Normally you will want these properties to reload from the database to correspond to the newly selected part.
  - To override this behavior, check the *Don't Reload Shape Properties when Part Number changes* checkbox.
- In the Find and Replace Tool, when renaming the System field in one or more shapes, you can now also select a Bill of Material shape that is already set to show parts from only that system.
  - If you include the BOM shape in the replacement, it will be updated as well to show the new system name.
- In the Table of Contents tool, it was unclear whether it would show the *System Name* or *Page Name* values on the table.
  - These two values are now both shown at the same time.
  - The Format String now includes tags for showing either or both.
    - &s is System Name
    - &n is Page Name
- On the Title Block shape, the *File Name* field will wrap and resize better.
- On the generated Device Detail shapes, long names now wrap better.

December 8, 2017

- You can now upload individual files to the server.
  - On the *Files* tab, select one or more files, right-click on them, and select UPLOAD CHANGES.
- The Network Tree device for the SmartStruxure AS-P now supports Infinet buses on the COM ports.
- In the Box integration service, the number of API calls being made has been significantly reduced.
- In the Security Door Schedule templates, the *Location* column has been replaced by two properties *Location Installed* and *Location Services* to match the properties of the Network Tree devices.
- When generating Word documents, template documents opened by newer versions of Word may be set to open in Reading Mode (e.g., if they were downloaded from an email message).
  - This caused a problem until the mode was removed manually.
  - $\circ$  This mode will now be turned off automatically.

#### **Design Module**

• The new Terminal Block shape can now be found on the right-click menu under *Page Add Ins*.

# Release 4.0.519

November 3, 2017

# **Core Module**

- When creating custom Schedule Node reports, the properties of the parent Project Node (e.g., Estimate, Design, Job or Site), such as *SiteName*, and the properties of the Schedule Node itself, such as *Name* and *Description*, can be used as heading fields.
- When viewing previous version of a project, you can now view multiple versions simultaneously along with the current version.
- Schedule Node reports and generated templates will now be saved as .xlsx files by default.
- When you delete a local project, it will now be placed in the Windows Recycle Bin, where it can be restored.
- When entering an IP Address on the Properties tabs of Network Tree, pressing "." will move to the next octet.
- The Network Tree device node for the bCX1 has a new bus configuration tab.
- The Damper Schedule has been updated to properly show properties of the selected actuator.

- There is a new Terminal Block shape with new features and functionality.
  - Existing Terminal Block shapes can be easily updated.
  - Refer to the updated chapter for full details
    - Designer Module New Terminal Blocks (Nov 2017).pdf
- In the DESIGN TOOLS→FIND AND REPLACE tool, you can now right-click on a row and select SELECT SHAPE to go to the appropriate page and center that shape on the screen in Visio.
- When generating Rows for the Designer Shape Dictionary (see *Release 4.0.510*), it will now generate additional details for Sensor shape configurations.
  - O You will probably need to update the Shape Dictionaries from the ADMIN→LIBRARIES, TEMPLATES AND STANDARDS→DESIGNER MODULE SHAPE DICTIONARY→MANAGE SHAPE DICTIONARIES form.
- There are updates to the Security Schedules and Shapes

- A new schedule type was added for Cable Types for the Door Components. For each component, you can select a *Cable Type* for that component, which will automatically sync with the specified Cable Types schedule.
- The Controller Schedule was updated to include new fields for *Location*, *I/O*, and *Notes*. The Controller Schedules also have detailed reports for each type of point that is in use for by a door component.
- The Controller Schedules now have a detailed I/O Statistics Report that will show the number of used and available points by type for each controller.
- The Door Schedule was updated to include new fields for *Controller ID*, *Cable Type*, and *Notes*.
  - *Controller ID* will display a comma separated list of all controllers used by individual components for the door shape.
  - *Floor Plan Reference* will now display the page name in the Visio drawing that the door shape is on.
  - *Cable Type* will display a summarized list of Cable Types used by individual door components for the door shape.
- The Door Properties for now includes individual checkboxes to the *Door Name*, *Detail Reference*, *Cable Type* and *Note* on the Door Shape in Visio.
- The Door Component Properties page now includes *Cable Type* and *Symbol Type* fields.
  - *Cable Type* will allow you to select the type of cable used for the specified component.
  - *Symbol Type* will allow you to select the shape of the component in the Visio drawing from a predefined list. There is no restriction to the number of components that can be added to a Door Shape now.
  - The BOM Tag will now set a default value based on the Device Type selected, but when modified it will keep its value.
- The Door Shape in Visio has been updated with the following features:
  - The information bubble for the shape will grow or shrink to include the selected information to display.
  - The information bubble will also snap its connecting line to the nearest midpoint of the Door Shape as it is moved around.
  - The Door Shape dashed box will now scale independently from the information bubble and individual components. The connecting line to the information bubble will adjust accordingly when scaled, but never lose connection.
  - The *Note* field has a control handle that allows it to be moved around the shape.
  - The Door Components will display their BOM Tag inside of it.

# Reporting

• You can now embed reports that are run in Excel into a Word-based report.

• In the Word document, find the place to embed the Excel table and add a reference to that report in this format:

[ExcelReport Name=Estimate Summary.xls; RepeatHeaderRows=1;TableWidth=7.5"]

- The Excel report must be part of the same set of reports (e.g., Designer or Estimating), and so its template will be located in the same folder as the Word report template.
- When the Word report is run, the Excel report is run separately (using the same project and settings as the Word Report), and the results are copied from Excel into Word as a Word table.
  - The results are NOT an embedded Excel file. It is a copy of the data transformed into a native Word table. A viewer of the report does not need to have Excel installed.
  - The fonts, widths and heights of the cells are all scaled to fit in the width of the Word document. Reports with many columns may become too small. In these cases, you should consider making a custom version of the Excel report for use with the Word report.
  - You can specify the width of the table to generate with the *TableWidth* parameter, as shown.
- The *RepeatHeaderRows* parameter specifies the number of top rows to repeat when the table breaks onto a new page in the Word document.
- On the *Reports* tabs, you can adjust the width of the Report list by dragging the splitter to its right.

# **Release 4.0.518**

*September 15, 2017* 

- You can now export any portion of a Project or Network Tree along with a copy of the files stored on each.
  - Right-click on any tree node and select EXPORT  $\rightarrow$  EXPORT TREE NODES AND FILES
  - The files and the tree export will be saved together in a file named with *.stzip* extension.
  - You can copy the *.stzip* file to the *Files* tab of any other node in the same or different project. If you double-click it, it will add the tree and the files to that location.
- On the *Files* tab, you can now view the Date Uploaded field as a column. From the VIEW menu, select and check FILE DATE UPLOADED.
- On the *Emails* tab, you can forward a saved email as an attachment in a new email by right-clicking on the email and selecting SEND AS EMAIL ATTACHMENT.

- When distributing files at a company or enterprise level, the recall.txt file will now handle files with a comma or a semi-colon in their name. In these cases, precede the comma or semi-colon with a backslash (e.g., "*File for Tom*\, *Dick*\, *and Harry.xls*"
- There are new features available for the Submittal Generator:
  - For the Submittal Document, you can now specify one Title Page template to use for the Document itself and a separate one for the child sections.
  - In a Submittal Generator *Part Information PDF* node, in cases where the PDF is used for multiple parts and the Part Number column notes this (e.g., "*MNB-300* + *1 other*"), you can now right-click on the PDF file name to view all the associated part numbers.
- There are new features available for the Schedule Builder and Schedule nodes:
  - When editing a Schedule Template, there is a new property for each column called *Description*. This text will automatically be shown as a pop-up tool tip when the user hovers over the column heading in the Schedule.
  - Copying and pasting data on the Schedule tab of a Schedule Node has been improved. For example, you can now copy one cell and paste that same into multiple cells.
  - There is a new type of column that allows the user to enter a custom Net Cost for parts entered into a schedule.
    - This can be useful when the user enters parts that are not in the Parts Database, or want to override the database price (such as for special pricing).
    - To configure this column, set the *Data Type* of the column to *Double*, set *Data Type Calculation* to *Part Net Cost Field*, and select the *Linked Part Number Column*.
    - When carrying over parts from the *Schedule* tab to the *Parts* tab, it will use this value in this column if it one is specified. If not, and if the selected part number is in the database, the *Net Cost* from the database will still be used.
- There are new devices and properties for the Network Tree:
  - Ethernet devices have three new IP Address properties on the *Network* tab: *Primary DNS Server, Secondary DNS Server* and *Time Server*.
  - There are now devices for some of the oldest I/Net devices, including: 7797, DPU-7910, DPU-7920, DIU -7930, DIO-7940, UCI-7760, UC-7260, UC-7270, DCU-7700, DCU-7740, ISITE-7728, LIU-7780, TAP Device and FOI-Fiber
- The Parts Database will normally load into memory in the background shortly after Studio launches. To suppress this, add the following to the *Smartware Studio.ini* file (from HELP→ABOUT press CTRL+ALT+SHIFT+I):

```
[Settings]
PzCacheDontLoadAutomatically=True
```

- The Windows Service will send a separate email to the users configured for Status Reports when an updated version of Studio needs to be installed on the machine running the service.
- When first setting up a new workstation, Studio will now ask where to create the Local Project Folder (either in its default My Documents location or a user-specified custom location).
- The Setup and Administration Guide has been updated.

#### **Design Module**

- You can now specify custom BOM Tags for the accessory parts shown on the Accessories tab of the part shapes.
  - This custom *BOM Tag* allows you to control how accessories are grouped and sorted within the Bill of Materials.
  - If you leave the *BOM Tag* blank, it will continue to use the current default naming convention by adding "\_1", "\_2", etc. to the main part's *BOM Tag* (e.g., C1001\_1, C1002\_2, etc.)
- The Find and Replace Utility has been updated
  - You can now search and replace in the Part Number field.
    - Be aware that changing the part number for a shape to an incompatible part number (e.g., changing a Sensor to an Actuator part) may lead to incorrect results.
  - You can now replace a portion of the text with another piece of text (e.g., finding "WP3" and replacing it with "WP4" can now change "WP3Sts" to "WP4Sts" and "WP3DaT" to "WP4DaT")
- An issue was discovered that, in some relatively rare cases, could cause the scanned project data to become out of sync with itself. To handle these cases, Studio will do a full rescan of the Visio files in a Design project the first time it's accessed with this release.
- There was an issue with panel shapes not rescaling based on the enclosure's scale when multiple panel shapes were dragged into an enclosure. This has been fixed.

#### **Estimate Module**

- When creating a new project by duplicating an existing Estimate project, it will also offer the user an option to load in an Estimate Model, which will override the model in the project being duplicated. You can disable this option and prevent users from ever overriding the original model.
  - In the *Smartware Studio.ini* file (from HELP→ABOUT press CTRL+ALT+SHIFT+I), add:

```
[Estimating]
LockEstimateModelDuringProjectDuplicate=True
```

• To make this setting company-wide, add this setting to the Site.ini file located in the Studio Server Folder in the *System Config* sub-folder.

- You can add a link to an external web site on the Summary and Tax tabs of the Estimate. For example, you could provide a link to a site that lists state or other tax information.
  - In the *Smartware Studio.ini* file (from HELP $\rightarrow$ ABOUT press CTRL+ALT+SHIFT+I), add something similar to the following:

```
[Estimating]
LaborRateLinkUrl=http://www.thewebsite.com/TaxPage
LaborRateLinkDescription=Labor Tax Rates
```

#### **Parts Database**

- When adding or editing a Part in the Parts Database Manager, you can now select and add Accessory parts on the *Additional Fields* tab.
- When a User part submitted for approval has been accepted or rejected by the Parts Database administrator, an email will be sent to the original user.
  - This feature requires that the *Studio Windows Service* and the *Outgoing Email feature* have been set up and configured.

# **Release 4.0.516**

August 10, 2017

# **Core Module**

• The Proxy Server settings can now be set on the License Registration form.

# **Release 4.0.515**

August 1, 2017

# **Core Module**

- You can now rename a project without opening and checking it out.
  - Right-click on the project in the Open Project list and select RENAME PROJECT.
  - You must still have the permission to check out and edit the project.
- The Damper Schedule was upgraded to use decimal values for the width and height.

# Network Tree

- SmartStruxure devices can now scan and show properties of any backup (.xbk) files stored on their *Files* tab.
  - Copy the .xbk file to an AS or Enterprise Server device node in the Network Tree, right-click and select TOOLS  $\rightarrow$  SCAN FILES.
  - Certain properties (Software Version Number) will be updated in the file list.
  - The *Software Files* tab of the device will also show that a backup file is available.

• You can also run the *Software Files* Property Sheet report on the Network Tree to determine which devices have or do not have backup files.

# **Release 4.0.514**

July 12, 2017

- The Smartware Expression Language Reference Guide has been updated.
- The form that asks if you want to check out a project when you open it has been updated.
  - The text attempts to clarify when you need to check out a project and when you don't.
    - You will no longer be prompted if you don't have permission to check out that project.
    - There is an option to not show the form again. In this case, you will need to explicitly check out projects after they're open using FILE $\rightarrow$ CHECKOUT PROJECT.
      - This option can also be changed from TOOLS $\rightarrow$ OPTIONS on the *Workstation* tab.
- In the Submittal Generator, there are two new options that affect the Tables of Contents and Bookmarks:
  - If you set *Exclude Pages from Bookmark Tree* and TOC to True, the itemized names (e.g., the Part Information PDF file, the Report name or the File name) will not be itemized in the Tables of Contents or the bookmarks.
  - For a Files node, if you set *Hide File Extensions* to True, the files will be listed without their file extension.
- The Valve Selection data is now pre-loaded in the background on startup, which makes it much faster when accessing the tool from TOOLS→PARTS→BROWSE VALVES AND ACTUATORS or the Schedule Builder.
- The Schedule Builder has been enhanced:
  - You can now add Filters to allow the end user to filter the rows based on the values.
    - In the Schedule Template, for any String-based column, you can set the new *Show Filter Control?* property to True.
    - If any filters are enabled, a new panel will appear on the right side of the schedule to allow the user to specify filter values.
    - When filters are active, the rows cannot be edited or reordered until the filters are cleared.
  - There are new Schedule Builder Templates:
    - New VAV Box Schedule (b3 and I/A MNB versions).
      - These are designed to work with the SmartStruxure Automated Engineering Tool (AET)

- New Air Flow Schedule
- Updated *Damper Schedule* with a selectable Part Number
- There is a new button, ADD X ROWS, to add multiple blank rows at once.
- When you select a row or rows (by clicking in the first empty column of the row), the right-click menu also has options for INSERT ROW and INSERT ROW X.
- Copying and Pasting of multiple values has been improved.
- The *Group* field is properly carried over from the Schedule tab to the various System nodes.
- In the Windows Service settings, you can now configure error emails to not send duplicate error more than once every number of minutes.
  - From ADMIN→WINDOWS SERVICE, go to the *Outgoing Email* tab and set the MINUTES BETWEEN DUPLICATE ERROR MESSAGES value.
- In the Open Project List form, to make it easier to UPLOAD CHANGES to multiple projects, the list will now retain its sort and position after the upload.
- In the *Generate Automation Overview* tool, there is an explicit option for showing the *Name* and *Part Number* beneath the devices.
  - This format is useful when generating the Overview using large images, as the *Name and Part Number* values will no longer be shown in the shape in this case.
- In the *Property Sheets* utility, there is a new report format for *BACnet Buses*.
- Purged nodes had not been fully deleted from the project file, resulting in larger project files. This has been fixed.
- There are numerous other performance improvements.

- The time to load a Designer drawing has been significantly reduced, especially in larger drawings.
- When creating a Schedule Builder Template, there is a new property, *Show on Schedule Chart*, which indicates whether the column should automatically be added to a new Schedule Shape that points to the Schedule.
  - This property will not affect existing Schedule Shapes, or ones that are being updated. It only affects the first selection of columns for a Schedule Shape.
- The Schedule Shape now allows you to add a Row Filter expression to hide rows that don't satisfy the condition.
  - Example:

```
System LIKE 'AHU%' AND CONVERT(ActualCv, 'System.Double') > 2
```

- All of the Schedule columns are treated as text, so comparisons of numeric values require a Convert function.
- For complete details of expression syntax, search the web for the term '*DataColumn.Expression*'

- In the Designer Tools for *Update Drawings*, there is a new option to upgrade all shapes to the latest version.
  - This upgrade is normally done (with a confirmation) when the drawing is opened.
- The Tridium IO-16 and IO-34 shapes have a new option for adding a Power Supply tag to the common terminals for the relays on the DOs.
- When selecting an Actuator part for the Actuator shape there is a new filter to select a range of *Torque* values.
- The border design for *Device Detail* drawings has been updated.
- In the System Tree, on the *Points* tab, the EXPORT TO EXCEL button had been disabled. This has been corrected.
- If you undo changes to a drawing file, Studio will re-download the previous version of the file. It was not, however, forcing the file to be rescanned which could have resulted in incorrect reports. This problem has been resolved.
- When moving Panel Device shapes with the arrow keys, there were some delays. This has been resolved.

# **Estimate Module**

- You can now designate each part in the material list as Taxable or Non-Taxable.
  - By default all parts are Taxable.
  - To designate a part as non-taxable, check the *Is Non-Taxable* box for that part.
  - The Non-Taxable parts are excluded from the total used to calculate the tax on material with the rate shown on the *Expenses/Taxes and Freight* tab.
    - *Sales Tax* is not affected by these settings.
- You can now have the calculated Travel Hours be added back to the Estimate as labor cost.
  - In the ESTIMATE SETTINGS, on the *Labor Codes* tab, there are three new columns to enable this calculation:
    - If *Include Travel Hrs* is set, then the calculated Travel Hours for that labor code will be added back to the total labor.
    - If *Custom Travel Hrs* is not set, the travel time per trip will be calculated as twice the *Travel Time (one-way)* calculated on the *Expenses/Travel* tab in the *Travel Parameters* section.
    - If *Custom Travel Hrs* is set, you can specify a custom number of hours per trip for that labor code in the *Travel Hrs per Trip* column.
  - On the *Expenses/Travel* tab, you will also need to check the InCLUDE TRAVEL HOURS checkbox to turn on the calculation based on those settings.
    - The total *Travel Hours* will be shown as a new row in the TRAVEL COSTS BY LABOR CODE table.
    - These calculated hours are added into the *Total Hours* on the *Labor/Total Labor* tab and in other places that use the calculated Total Hours (but not the hours used to calculate the needed trips).

- These are similar to *Block Labor Hours*, as they are not associated with any System or Area, and will not be included in the reports that show hours by System or Area.
- In the Estimate's utility to scan all the parts and check to see if there are pricing updated (*Material/Update to Database* tab), you can now flag parts that should be ignored and left alone during the update.
  - Check the IGNORE checkbox next to the part number to ignore.
  - To view the ignored parts, check the SHOW IGNORED PARTS? Checkbox.
- When viewing Part Packages in the part browser, the prices shown will now match the latest prices from the Part Database.
  - This is consistent with the prices that will be used when the package is added to a system.
  - The labor factors specified in the package are <u>not</u> updated to those in the parts database, as they might have been customized by the person creating the package.
- The *Material List by System* Data Source (*qryPartsBySystem*) now includes the *MfgName* and *VendorName* fields.

#### **Parts Database**

- The Valve and Actuator Selector has been improved.
  - When you select a Body Style of *PIBCV*, there is a new filter to select a range for the *Flow Rate*.
  - For Actuators and Valve Assemblies, there is a new filter to select a range of *Torque* values.
- When creating custom Software Tag Sets, you can now specify multiple connection types (e.g., AI, DI and SI) for a single Software Tag.
  - You can update multiple Software Tags at once using multi-selection and the right-click menu.

# **Release 4.0.511**

May 19, 2017

- The amount of total memory that Studio can use has been significantly increased, which should allow for larger projects to be opened without issue.
- When creating Automation Overview drawings from the Network Tree, it is now possible to have images in place of the square blocks for each device.
  - Each part in the Part Database can have a selected Automation Overview image
    - The images for parts in the master database must be specified by Smartware. If there are images you'd like to see added, please email them with the associated part numbers to <u>partsupport@smartwaretech.com</u>.

- To associate a Part Image with a Company part in the Parts Database, edit the part and go to the *Panel Shapes and Images* tab to select the image.
- $\circ$  When generating the Automation Overview, there are new options to use the images.
  - Check the USE PART IMAGE FROM DATABASE WHEN AVAILABLE to use the images.
  - The default action is to replace the entire square with the image, which hides the *BOM Tag* and *Part Number* normally shown.
    - To have the image appear smaller, but with this text, also check the USE SMALL IMAGES INSIDE DEVICE checkbox.
    - You can also adjust the text below each shape to include these fields.
- In the TOOLS  $\rightarrow$  PARTS  $\rightarrow$  MANAGE MY PARTS tool, you can now duplicate a User part.
- In the TOOLS→LIBRARIES-->MANAGE MULTI-FILE LIBRARIES, there are now features to filter by Category and Search by text.
- The *Setup and Administration Guide* has been fully updated.

- Users can now submit their own Part Images for approval and incorporation into the Company Database
  - Users create the Part Image records by going to the TOOLS→PARTS→MANAGE MY PART IMAGES.
    - The parts now show an Approval Status and include a button to SUBMIT IMAGE.
  - In the Parts Database Manager, the administrator can select DATA TABLES→USER PART IMAGES FOR APPROVAL.
    - Click EDIT IMAGE to view and edit the Part Image data.
    - Click APPROVE IMAGE to add the Part Image to the Company Database.
    - Click DELETE IMAGE to reject the submission. The image will NOT be removed from the user's database, and can be submitted again.
  - Part Administrators can subscribe to be notified when User Part Images have been submitted for approval.
    - These notifications can be enabled by going to ADMIN→PARTS DATABASE then selection OPTIONS→OPTIONS.
    - The Studio Windows Service and the Notifications feature must be installed and running.
- When creating Index Drawings with Device Details, you can now choose a manual order to the Images being generated.
  - While editing a Device Details Drawing, check the EDIT SETTINGS box, then the MANUALLY ORDER DETAILS box, then click the SET MANUAL ORDER button.

- When using the *Generate WorkPlace Tech Applications Utility*, it will now set the Engineering High and Low Scaled values for Analog Inputs and Analog Outputs, where appropriate.
- There is a new option to control when the Optimize Document Stencil utility is run when drawing files are saved.
  - In TOOLS→OPTIONS, go to the *Designer Module* tab and refer to the OPTIMIZE DOCUMENT STENCIL WHEN DRAWING FILES ARE SAVED option. This is checked by default.
  - For larger files, this process may take some time. The default limit is now to not run the utility if there are more than 5,000 Visio shapes. You can change this value so the optimization is done on larger or only smaller files.

# **Estimate Module**

- There is now a full set of Estimate Group reports available.
  - The Estimate Group feature is described in the notes for Release 4.0.507
- The Estimate toolbar's Include/Exclude button can now be used to include or exclude Estimates from an Estimate Group.

# **Release 4.0.510**

May 1, 2017

# **Core Module**

- The *Edit User* form is now resizable to allow the full list of *User Groups* to be viewed.
- When a Report Group is used in the *Custom Templates.xml* file, the file name specified by *<DefaultFileName>* will be used as the name to save the file.

# **Estimate Module**

- There is a new report, *Material List (By Area)*, which groups the parts by Area.
- There was an issue with Schedule Nodes not fully updating the part list on themselves or the referenced System Nodes.
  - This issue has been resolved, but may cause Estimates to notify users of the calculation change when the Estimate is opened.

#### **Service Estimate Module**

- There is a new option to duplicate a piece of Service Equipment multiple times.
  - Right-click on the equipment and select DUPLICATE X
- When exporting to FieldCentrix, the <tag> field is now included.

#### **Design Module**

- Most of the SmartStruxure IO Module shapes have been upgraded to show a ground connection by default.
  - This includes the UI8-AO-4, UI8-AO-V-4, AO-8, AO-V-8, UI-8-DO-FC-4, AO-8, DI-16, RTD-DI-16 and UI-16 modules.
  - You can turn this off from the *Ground* tab of the module's Part Properties form.
- When selecting columns for a Schedule Shape, there are now a SELECT ALL and UNSELECT ALL buttons.
- There are new tools for managing the Designer Shape Dictionary files, which create the Add a Designer Shape menu available by right-clicking on the Visio page.
  - To open the Manage Shape Dictionaries utility:
    - Go to Admin $\rightarrow$ Libraries, Templates and Standards.
    - Select the Designer Module Shape Dictionary Tab.
    - Click the Manage Shape Dictionaries button.
  - There is also an option in the form that adds a button to many of the Part Properties forms to ADD DICTIONARY ROW.
    - When clicked, you can select an existing Dictionary file to which the row should be added.
    - The row will include as many of the current shape's settings as are supported (e.g., Accessories, Sensor Settings, etc.)

# **Release 4.0.509**

March 12, 2017

# **Core Module**

- When browsing parts, there is a new *Vendor* filter list.
- The Connectivity dialog has a new option to simulate being disconnected.
- When creating a Valve Schedule synced to one or more Belimo SelectPro files, removing the .BEL file was not always removing the associated parts from the schedule. This has been resolved.

#### **Estimate Module**

• There is a new reporting Data Source, *Subcontractors*, that has a more detailed breakdown of the subcontracts in the estimate.

#### **Design Module**

• When selecting columns for a Schedule Shape, there are now a SELECT ALL and UNSELECT ALL buttons.

*February 22, 2017* 

#### **Core Module**

- The widths of the panels containing the Toolbox, Project Tree and Network Tree on the main form will now be saved when closing and opening Studio.
- You can easily access the database containing your user parts (e.g., to move it to a different workstation) from the TOOLS→OPTIONS *Parts Database* tab.

#### **Designer Module**

- The maximum length of a System Name has been increased to 50 characters
- Schedule Nodes can now contain multiple Part Number columns, each with separate associated columns, such as:
  - o Linked Part Field (Description, Vendor Name, etc.)
  - *Quantity* (create a column with *Data Type* of *Double* and set *Data Type Calculation* to *Part Quantity Field*)
  - o Device Detail List and Device Detail Reference
- On the Designer root node, there was a second reports tab labeled "Reports (DS 2005)" that could run older reports for backward compatibility. These reports are no longer fully supported and may not have accurate pricing. This tab has now been removed.
  - If you have a specific need for one of these reports, please contact Technical Support to discuss an upgrade.
  - The tab can be shown by using a setting in the *Smartware Studio.ini* file:

[Designer Suite] ShowDs2005ReportsTab=True

# **Estimate Module**

- There is a new feature that allows you to organize a set of Estimates together to create aggregate reports of costs, material and other information.
  - To start, create a new *Estimate Group* node in your project tree.
  - You can copy or move Estimates under the Group, or add Shortcuts to existing Estimates that are on the server.
  - There are tabs that show an expandable version of the aggregate data for *Summary, Material by Vendor, Material by Part Number, Labor, Subcontracts*
  - *Note*: Not all the reports are available in this release. They will be in the near future.
    - *Update*: The remainder of the reports were Added in Release 4.0.511

January 25, 2017

# **Core Module**

- In many cases, Studio automatically maps one or two local drive letters to point to other folders, such as the local or server project folders. Normally it ignores existing drive mappings, but if this is causing a conflict, you can specify a list of drive letters that Studio should avoid.
  - In the *Smartware Studio.ini* file (from HELP $\rightarrow$ ABOUT press CTRL+ALT+SHIFT+I) add the following item:

```
[Settings]
DriveLettersToIgnore = M,X,Z
```

- The performance of the Schedule Node has been improved.
- An issue with shortcut node icons has been fixed.

# **Designer Module**

- When editing a drawing containing a Schedule Shape, if the data in the Schedule is changed the shape will indicate that it needs to be updated with a yellow box over the schedule noting "Needs Updating".
  - To update, right-click the shape and select Update Schedule Shape.
- When adding certain shapes with suggested BOM Tags, such as sensors (e.g., a Temperature Sensor with TS1), the BOM Tag will automatically find the next available tag to use (for example, TS1, TS2, TS3...)

# **Estimate Module**

- There are a number of additional Data Sources for Estimate reports, which can be viewed using the VIEW DATA SOURCES button on the Reporting tab.
- The *Point Detail List (By System)* report has been updated to include *Category*, *Connection Type*, and *Point Name*.
- An issue with items in the Labor tab resizing improperly has been fixed.

# **Release 4.0.503**

January 9, 2017

# **Core Module**

• In cases where users have a Windows display setting to increase text and other sizes (i.e., DPI set to 125%), some forms may not have been displayed properly. These problems seem to have gone away when using Windows 10.

- There is now a procedure for users to submit System Libraries (MFLs) to be reviewed and approved by an administrator.
  - Users can create and edit the libraries from TOOLS→LIBRARIES→MANAGE MULTI-FILE LIBRARIES.
    - They should Right-click on the Library to submit and select SUBMIT LIBRARY FOR APPROVAL.
    - This will copy the Library onto a temporary folder on the server ([SERVER FOLDER]\Resources\Review\System Library).
  - Administrators can then go to the Parts Database (ADMIN $\rightarrow$ PARTS DATABASE) and select DATA TABLES $\rightarrow$ SYSTEM LIBRARIES FOR APPROVAL.
    - This shows a list of all the libraries pending approval.
    - The Administrator can view and edit the Library, its properties and its contained files.
    - When the Library has been reviewed, the Administrator can right-click on the library and select APPROVE LIBRARY or REJECT LIBRARY.
    - If approved, the library is copied into the Company's main Library folder, and it will be downloaded onto users' machines during the next update. If either approved or rejected, it is removed from the *Review* folder.
- There are new features associated with the Email Notification service:
  - For files and folders you subscribe to, you will be notified if the file is signed or locked, or if an email is added to the folder.
  - Part Database Administrators can request notifications for when a user has submitted a Part or System Library (MFL) for approval in the database.
    - These notifications can be enabled by going to ADMIN→PARTS DATABASE then selection OPTIONS→OPTIONS.
- When creating a Part Package, you can now specify Subcontract information to be included with the package and inserted into the system when the package is added.
- There are new devices for the JACE 8000 for the Network Tree in the Tridium stencil.

- You can now link a Device shape with an I/O Point shape to effectively associate the point with the Device.
  - $\circ$   $\,$  This allows the creation of custom Smart Shapes with Points.
    - For example, you can link a Smart Clone shape to an I/O to create a custom type of Sensor. The BOM Tag and Part Number of the Device will be shown on the Controller Checkout sheets associated with the point, as it is for Sensor shapes.
    - You can link multiple I/O Point shapes with the same Device shape to create effective Combo Sensors.
  - To make the link, in the I/O shape to the Device shape check the LINK POINT TO DEVICE checkbox and then select the *BOM Tag* of the Device.

- There is a new shape for the JACE 8000 in the Tridium stencil.
- There is a new checkbox in the Part Properties form for most shapes to indicate that the part "Is Existing".
  - These parts will show as "(EXISTING)" on the BOM Shape.
  - The Submittal Generator's Part Information PDF node allows you to choose whether to include these parts' PDFs.
- There were performance issues running shape Part Properties if the Visio Shape Data window happened to be open. It will now be closed automatically.
- The performance of the Panel Shapes has been improved.

#### **Estimate Module**

- The points on the Points tab in a system can now be reordered with the up and down arrows.
- When a System is added to an Estimate from a Library, Export or Copy and Paste, and it originated in a different type of Estimate (Project Estimate vs. Service Estimate), the unrelated data will be removed.
  - When a Service Estimate System is added to a Project Estimate, Service Equipment data will be removed.
  - When a Project Estimate System is added to a Service Estimate, Parts and Points data will be removed.
- When importing data onto a System from an Excel spreadsheet, you can now specify *MfgName* as an alternate to *MfgUID* (for cases where the Manufacturer is not in the database).

# **Release 4.0.500**

November 21, 2016

# **Core Module**

- On the Network Tree, there is a new *LON Switch* device and a modified *LON Router* device for FT10/XF1250 compatibility
- The expression language now includes a REPLACE function.
- Some connectivity issues with the Open Project dialog have been improved.

- The Schedule Shape has been enhanced with new functionality
  - There is now a single Schedule Shape in the stencil and on the Drawing Assistant menu that handles all types of schedules, including *Revision Notes*.
  - $\circ$  You can now configure a schedule shape to show a set of Software Points for one or more devices

- In the Schedule Shape Properties, for the SCHEDULE MODE select Software Points in Drawing or Software Points in Network Tree
- For Points in the Drawing, click the Select Parts button and choose the appropriate controller shapes.
- For Network Tree devices, select the device from the list and whether you want to include points from its child devices as well.
- •
- For Smart Chart schedules, there is a new option to Link the System's Typical Of value to the Schedule's Row Count.
  - When this option is set, the *Typical Of* value in the drawing cannot be changed drawing using the menu command or Typical Of shape (it will be shown read only). Only adding or removing rows from the schedule in the project will affect it.
- The default font size for the schedule shape has been reduced.
- In the *Security Devices.vss* stencil, new shapes for *Generic Input, Electric Lock* and *REX* shapes were added.

October 25, 2016

# **Core Module**

- There can now convert any folder-type node into a Multi-File Library.
  - Right click on a node containing files and select EXPORT → EXPORT TO MULTI-FILE LIBRARY.
  - The MFL will be created in your local library, and you will be given the opportunity to edit its categories and properties.
- The Submittal Generator's Part Information PDFs can now be sorted by the custom *Grouping* field.
  - Grouping fields were introduced for Estimate parts in *Release 3.4.406*.
  - They are also available now for Designer shapes.

- A recent Office security update by Microsoft (October 11, 2016) has been found to affect the ability of Visio to open some of the Designer stencils. In cases where the update has been applied, Visio will immediately become non-responsive and never finish opening.
  - If a drawing file was last saved with any of these affected stencils open, the drawing will automatically try to reopen the stencils and therefore it too will become non-responsive as well.
  - All versions of Visio from 2003 to 2016 have been reportedly affected.

- The affected stencils have been altered to work around the Microsoft bug, so installing this Studio update should fix the problem completely.
- The Schedule Shape now allows you to specify a Title that will appear above all the columns.
- The speed at which the Schedule shape redraws itself when updated has been significantly improved.
- The custom Grouping field introduced in *Release 3.4.406* has been extended to the Designer shapes. Refer to those earlier release notes later in this document.
  - On the *Properties* tab of the Designer node, you can specify which of the three sets of grouping values to use by default.
  - In the Part Properties tab of most shapes, you can select one of the pre-defined values or enter a custom value.
  - The Grouping values will carry forward to the Designer System Tree
  - You can use this field to group parts together in the Submittal Generator's Part Information PDF node.

#### **Estimate Module**

- When a System node is added to an estimate from a Multi-File Library, the *Comments* tab of the new System node will note the library's details.
- The Area node now has a SUMMARY tab similar to the one available for Systems.
- On the *Parts* tab of a System node, the *Description* column now has a maximum width for display.

# **Release 4.0.497**

October 6, 2016

# **Core Module**

- Custom Templates based on *.docm* or *.xlsm* formats now support the *ProcessTemplate* option for replacing values in the generated document.
- In the ADMIN→PERMISSIONS→FILE SERVER USER ACCOUNT tool, there is a new button to TEST IMPERSONATION.
- In the Submittal Generator's Reports node, you can provide a custom name for each report (to be shown on the tables of contents and bookmark trees) by right-clicking on the report and selecting EDIT CUSTOM NAME.

#### **Designer Module**

• There is a new report, *Revision Notes*, that lists the details from all the revision notes on the Designer node's Revision Notes tab.

- The DESIGNER TOOLS tab now has a button to bring up the UPDATE DRAWINGS tool, which can be used to update the following inside one or more drawings:
  - Revision Notes
  - Project Property Labels
  - Drawing State setting
  - Bill of Material Shape
  - Schedule Shapes

September 20, 2016

- The application now runs on the Microsoft .NET Framework Version 4.6.1.
  - If you do not have this installed, you should automatically be prompted to download and install it from Microsoft's web site.
  - You can also choose to install the later Version 4.6.2.
- When using Multi-File Libraries (MFLs), information is now cached to dramatically reduce the time it takes to bring up the list of available libraries.
- There is support for allowing Studio to share files and folders with an account on the Cloud Sharing service called Box (<u>www.box.com</u>).
  - To use this feature, you must first set up a Box account to act as a repository for all shared files and folders. The account must be enable to allow outside access and configured as a Cloud Account under the ADMIN→CLOUD ACCOUNTS configuration tool.
  - You must also install and configure the Studio Windows service to run to continually monitor and synchronize files between Studio and the Box account.
  - Once configured, there will be a SHARE WITH $\rightarrow$ BOX ACCOUNT menu item available on files and folders to share them with the Box account.
  - There is a new Enterprise Management report for *Cloud Account Shares*.
  - The SEND TO  $\rightarrow$  PDF FILE feature now works with the .xlsx and .docx file types.
- The fields associated with an Engineering Point (e.g., AI, DI, AV, etc.) and the places where they can be specified have been enhanced.
  - The Points now support both Hardware and Software Points.
    - Software Points have detailed properties for different protocols, such as BACnet, Lon, and Modbus.
  - Additional properties, such as Engineering Units, have been added to make them consistent with fields available in Designer drawings.
  - The Point List was already available on the System node in an Estimate and on a Design project's System Tree. These versions have been upgraded.

- There is a new *Device Points* tab available on Network Tree Devices.
  - When known, the list of hardware points is automatically populated.
  - Software points can be added based on the allowed protocols of a device or the available child buses on head-end devices.
  - For I/A devices, you can import point information from a WorkPlace Tech software file.
- There is also a new *Software Points* tab in the Part Properties form of the controller shape in the Designer drawings.
- When running the Point Statistics report in the Enterprise Management reports, the software points will automatically be included.
  - There is an additional calculation Weighted Point Count that is also computed with this report. The Point Statistics reports for Design and Estimate have been updated to include these. You will need to rerun these reports to capture the new information.
  - To change the weightings, go to ADMIN→LIBRARIES, TEMPLATES AND STANDARDS and select the Points tab to specify the weightings based on *Hardware* and *Software* points that are in *Typical* and *Not Typical* scenarios.
  - Before running the report, you may need to click CLEAR POINT STATS SCAN DATE and rerun the SCAN POINT STATS FILES tool.
- In the Network Tree, the SmartStruxure Lite devices can now be added to a BACnet IP bus.
- In the Property Sheets tool, the *SerialNumber* property is available for the Devices category, and the *MacAddress* property is available for Ethernet Devices.
- In certain reports the Aggregate operator (AGG) didn't work if it wasn't all uppercase. This has been resolved.

- There is a new stencil for the Schneider Electric *AccessXpert* controller line
  - The new stencil can be opened from the Visio Shapes menu or the right-click Drawing Assistant menu.
- There is also a new stencil, located under the General section, for *Security Devices*.
  - This stencil contains the Card Reader shape, and will contain additional security devices in the near future.
- In the I/O Point and Sensor shape properties, in the Point Name list the points that have already been used will now be marked with a trailing asterisk (e.g., "UI2 \*").
  - You are not prevented from reusing the point.
- There is also a new *Software Points* tab in the Part Properties form of the controller shape in the Designer drawings.
  - Refer to the earlier notes in the *Core Module* section.
- There is a new square-shaped Revision Bubble in the *Page Add Ins* stencil and drawing menu.
- The Drawing Assistant spreadsheet (*DS Shape Dictionary.xls*) now allows you to specify many more properties to set on the shape as it's added to the drawing, including:
  - Part Properties: Description, System, Vendor, Manufacturer, Range, Quantity, Not Typical, PDF, Trade, Cost, Panel, Location
  - Show Checkboxes: Show Part Number, Show Description, Show Range, Show Note
  - Accessories: Accessory 1, Accessory 2, Accessory 3, ...
    - Each accessory cell should contain the various fields separated by the bar (|) character.
      - Show on BOM (as an O or X) | Quantity | Part Number | Description | Manufacturer | Vendor | Custom Cost
      - All properties after Part Number are optional.
    - Example: X|2|Part|Desc|MFG|Vend|99.95
  - o Device Details: Detail 1, Detail 2, Detail 3, ...
    - Each detail should be the name of the detail to include.
  - Sensor and I/O Point Properties: Connection Type, Software Tag, Software Tag Description, Show Power, Show Resistor, Resistor Value, Hide I/O Point, Eng Range Low, Eng Range High, Eng Range Units, Eng False Text, Eng True Text
- The Drawing Assistant can have items that only open a Visio Stencil instead of dropping a shape.
  - To do this, specify the *Stencil Name* and *Menu Path* parameters but leave the Master Name property blank.

## **Estimating Module**

- For Service Estimates, the *ContractBillFrequency* property now has a drop-down list of choices.
- The report data sources now include a property called *<FirstAreaName>*, which has the name of the first Area in the Estimate.

# **Release 3.5.490**

August 4, 2016

- There is a new category in the Property Sheets tool for Continuum Devices, which shows b3 and i2 devices in a mode that allows you to edit the *ACCNet ID* and *Infinet ID* properties.
- The DMS bus available on the Niagara devices will now allow Generic devices to be added to it.

- There was an issue running Reports specified in the Custom Templates file. This has been resolved.
- There was an issue pasting Excel data into a Schedule Node when there were blank lines in the copied data. This has been resolved.
- When using the TOOLS→EXTRACT TO NEW PROJECT utility, Schedule nodes did not properly bring in their rows. This has been resolved.

- The EPD series sensors are now available in the part list for the Sensor shape.
- The TTS-SE parts have been added to the TTS Combo Sensor shape.

#### **Estimating Module**

- When generating individual Task Sheets, the file name now includes the *Tag* field to make the names more distinct.
- There are additional reporting fields available in the *Globals* table:
  - *ExpensesTripOther*, the total shown of the "Other" line on the Estimate Summary, this is the *Other* field of the *Costs Pre Round Trip* multiplied by the total number of trips. This cost is already included in the *ExpensesTrip* value.
  - The 16 values from the costs table on a Service Estimate's Service Equipment tab are available, specifically:
    - ServiceEquipmentHoursTasks, ServiceEquipmentLaborCostTasks, ServiceEquipmentMaterialTasks, ServiceEquipmentSubcontractTasks, ServiceEquipmentHoursRepair, ServiceEquipmentLaborCostRepair, ServiceEquipmentMaterialRepair, ServiceEquipmentSubcontractRepair, ServiceEquipmentHoursRemoteSupport, ServiceEquipmentLaborCostRemoteSupport, ServiceEquipmentMaterialRemoteSupport, ServiceEquipmentMaterialRemoteSupport, ServiceEquipmentSubcontractRemoteSupport, ServiceEquipmentSubcontractRemoteSupport, ServiceEquipmentMaterialTotal, ServiceEquipmentLaborCostTotal, ServiceEquipmentMaterialTotal, ServiceEquipmentSubcontractTotal
- You can customize the Service Estimating Work Scope documents to include any subset of parts based on your use of the Category A field (e.g., *BAS*, *HVAC*, *Fire*) in the equipment list.
  - An included Work Scope documents (e.g., SE Work Scope BAS) includes a table with the tag <EquipmentListBAS> to show equipment with a Category A value of "BAS". You can now replace this tag with any value of Category A that you use (e.g., <EquipmentListMECH>)

# **Release 3.5.488**

July 7, 2016

#### **Core Module**

- There are new features in the Submittal Generator:
  - For the Page Numbers that can be added to the bottom, you can now specify if you want them on the *Left*, *Middle* or *Right*.
  - There is an additional option on each node to reset the page numbering to one for the first page of that section.
  - For the *Part Information PDF* nodes:
    - It will now default to not include PDFs for parts where *Show On BOM* is unchecked. Existing submittals will not be changed.
    - You can now select the *Reference* or *Programming* PDFs, if available.
    - The *Sorting Options* group box is now collapsible.
    - There is an additional option to *Show Parts that do not have a PDF*. This is useful to determine which PDFs are missing, and provides a way to add those PDFs to the submittal.
    - There is an additional property to *Show Description after Part Number*. This will add the part description after the part number in the Tables of Contents and the Bookmark tree.
- There are new features relating to the *Email Forwarding Alias* property of folders. This field is used in conjunction with the *Email Forwarding* feature of the *Studio Windows Service* to allow you to have emails forward from outside mail clients (such as Outlook) to specific Studio projects and folders. Refer to Chapter 12 of *the Setup and Administration Guide*, available from the HELP menu.
  - The Alias field can now be specified on any node in the Project or Network Tree.
  - If a folder has an Alias specified, the icon in the tree will include an envelope image (this only applies to folders other icons will not change even if an Alias is specified.)
  - When you enter the Alias, the complete email address for the folder is shown below it and easily copied to the clipboard.
  - The Alias can be formatting to include other properties by enclosing them in angle brackets as field codes. For example, the alias

<ProjectNumber>.<Name>

will substitute in those values when calculating the Alias, such as

JOB123.Correspondence@studio.acme.com

- This feature is especially useful in template projects that are duplicated to create new projects, as the values will automatically be updated to those from the new project.
- To see the names of the available properties, select View→Property Names and browser the Properties tabs. The Property Name will be shown in brackets
- The File Notification feature has been updated:
  - It will now store and note the date the subscription was created

 $\circ$  When viewing the list of existing subscriptions, you can now multi-select to unsubscribe.

#### **Designer Module**

• When using a Schedule shape as a Smart Chart, updating the BOM tags in the schedule did not automatically update the BOM shape. This has been updated.

#### **Estimating Module**

• On the System node's *Parts* tab, when displayed with a 125% monitor DPI setting, the *Is Not Typical* checkbox was not visible. This has been resolved.

#### **Service Estimating Module**

- There is a new column in the Equipment list called *Special Rules*.
  - The only rule currently recognized is MinQty=x. When specified for the equipment, if the *Quantity* specified is less than *x*, the costs for the equipment are calculated as if the quantity were *x*.
  - This field can also be specified in the *Service Equipment* table in the Parts Database.
- The Service Contract reports can now include field codes for *ReportPrintedBy*, *ReportPrintedByEmail*, *ReportPrintedDate*. Service Task Sheets can include the *Location* field code.
- The Estimate Properties Service Contract tab now includes individual fields for *Site City*, *Site State* and *Site Zip*.

# Release 3.5.485

June 15, 2016

## **Core Module**

- There are new menu options on the Project and Network Trees to EXPAND ALL and COLLAPSE ALL.
- In the Open Project list, the checkbox to ONLY SHOW 'NEW PROJECT' TEMPLATES has been replaced with explicit options to *Hide Templates*, *Only Show Templates* or *Show All*.
- The bus configuration options on the SmartStruxure devices have been updated.
- In the Enterprise Management report for *Design Drawings using MFL*, the list of Files to Ignore can now include \* and ? wildcards (e.g., "AHU\*).

- The *SmartStruxure* stencil has been renamed.
- There is a new network tree device for the *SmartStruxure USB Advanced Display*.

- The i2/b3 865-V and 866-V controller shapes have been updated to correct the dip switch orientation.
- The AS-B-24 and AS-B-36 controller shapes have been updated.

# **Release 3.5.483**

May 27, 2016

#### **Core Module**

- You can now quickly convert a Word, Excel or Visio file into a PDF file from the *Files* tab of any node. Simply select a file (or files), right-click and select SEND TO→PDF FILE.
  - Multiple files are generated into separate PDF files. To generate a merged PDF file, you can use the Submittal Generator.
- When using the NEW menu in the *Files* tab to create a blank Word Document or Excel Workbook, the generated file will be a *.docx* or *.xlsx*. file.
- There are updates to some of the Network Tree controller shapes:
  - There are new shapes for the AS-B-24 and AS-B-36 controllers.
  - The Tridium JACE 200, 600 and 700 shapes have been updated to properly reflect their BACnet and Ethernet buses.
  - The shapes for the BACnet Router and SmartStruxure controllers now include BACnet address properties.
- In the Valve Selector, metric columns are properly resized and the *Close Off Pressure* columns show their units in the column heading.

#### **Design Module**

• There are new shapes for the AS-B-24 and AS-B-36 controllers.

## **Estimating Module**

• The old TAC IA Series Order Form report has been replaced by SE – IA Series Order Form v3.1

## Reporting

• Reports now include a new header field for *<ReportPrintedByEmail>*, which is the email address of the user who ran the report.

# Release 3.5.482

May 13, 2016

- For the four root project nodes (*Customer Site*, *Job*, *Estimate* and *Designer*), some of the key Project Properties have been augmented so that the values are more consistent and carry down from parent projects.
  - For example, the *JobName* and *JobNumber* properties are not available in the Designer and Estimate node, and will carry down from a Job node if the Designer or Estimate node is within a Job.
  - The *ProjectName* and *ProjectNumber* fields are also available and overridable from the Job node to the Estimate and Designer node. For reports, these fields will still default to the Designer or Estimate Name, and the Job or Quote Number, respectively.
- In the custom NEW Menu created with the *Custom Templates.xml* file (and its variants), you can now control where the menu separators appear with more granularity when using multi-level menus.
  - If a menu item has *SeparatorBefore* set to True, it will now apply to the actual menu item (the one furthest down the menu tree), instead of to the first level menu.
  - You can also add an explicit separator at any level by adding a new type of entry in the file:

```
<TemplateFile>
<MenuPath>Our Menu/Engineering</MenuPath>
<AddSeparator>True</AddSeparator>
</TemplateFile>
```

- In this case, a separator will be added to the menu tree in the OUR MENU→ENGINEERING level after any existing menu items already defined at that level.
- The Submittal Generator *Reports* node now allows you to select from all available reports, including Word reports and Report Group Xml files.
- When editing the data in a Schedule Builder schedule:
  - The first keystroke after clicking in a cell might have ignored the position of the CAPS LOCK key. This has been resolved.
  - In some cases when using the Valve Selector form and calculating an explicit Cv range, the selected Part Number did not fill back into the Schedule, and/or the GPM value was not remembered the next time the Cv calculator was used. These have been resolved.

- There are new options on the TOOLS→DESIGNER MODULE tab that will prompt the user to update, as needed:
  - Shapes that need to be upgraded for new features
  - o Schedule Shapes pointing to schedules with updated data
- When the *Automatic Updating of Bill of Material Shapes* option is enabled, the BOM will now update when the Typical Of value of the system is changed from:
  - The DESIGN TOOLS  $\rightarrow$  CHANGE TYPICAL OF VALUES FOR SYSTEMS menu command
  - The *Typical Of* Page Add-In shape
  - An old-style *Smart Chart* shape
- The UPDATE DRAWINGS tool on the *Revision Notes* tab now includes the capabilities of the old Revision Notes tool, including
  - Removing *Revision Bubbles*
  - Updating *Project Property* and *Drawing State* labels
  - Updating *BOM* and *Schedule* shapes
- The *Error Checking* tool has been updated:
  - There is a new option to *Ignore Obsolete Parts* if the *Show on BOM* value is false.
  - In some cases with Combo Sensors, incorrect errors were being reported. This has been resolved.
- The MNB-1000-15 has been updated to remove the incorrect S-Link connector.
- When doing a SAVE As of an open drawing file that derived from an MFL, the MFL transaction history may not have been copied over from the original file when the file was open. This will now happen once the file is closed.
- When selecting parts with accessories, you will be notified and given an option to go directly to the accessories tab.
- Some issues with the Schedule Shape not updating properly have been resolved.

#### **Estimating Module**

- The Service Contract and Equipment Task Sheet templates can now include the same field codes available in other Word or Excel reports.
  - This includes the 60 *CustomValue* properties.
  - Task Sheets can also reference the specific Equipment fields (e.g., *<Tag>* and *<SerialNumber>*, as found in the *Service Equipment List (By System)* report.
  - Review the VIEW DATA SOURCES tool available on the *Reports* tab to see the available fields.
- The Service Equipment list has a new *Tag* field to allow the estimator to uniquely identify the equipment.
  - The associated reports have also been updated.
- There is a new Work Scope report for iPM (Intelligent Preventive Maintenance).

- When creating a custom Service Estimating Task Sheet, you can change the task tables' inner line color from green to black.
  - Locate the Word document's *Comments* field (generally found on the FILE tab in later versions of Word; also available by right-clicking on the file in Windows Explorer, selecting PROPERTIES, and going to the *Details* tab)
  - Enter the text *InsideColor=Black* as the comment.
- The calculated task labor hours in a Service Estimate were not carried forward to the itemized Labor reports. This has been resolved.

#### Reporting

• An issue where field codes in an Excel report template that contained a leading space character in the cell (e.g., " <ContractAmount>") wouldn't be filled in has been resolved.

## Part Database

- When editing a Part, you can now specify an image that should be used for the panel representation of the part in a Designer Drawing.
  - On the new Panel Image tab, select an existing Image.
  - To add new images, use the Data Table  $\rightarrow$  Part Images tool.
- The set of SEBA Point Names Software Tag Set has been greatly expanded with their updated standards, including over 800 tags. For projects using this set, they will automatically have access to the updated list after the next synchronization of the Parts Database.
  - If for any reason you do not want to use the expanded list, the previous list of 327 tags is available as a separately selectable Software Tag Set (SEBA Point Names 1.0)
- After adding or editing a User Part, the new and/or updated parts will be available immediately.
  - The Estimate's Parts Database tab will refresh immediately.
  - Other part selectors will refresh as well
- When viewing the detail of a Part, the list of defined accessories will be shown.
- Sensors have the ability to have multiple Extended Property Configurations defined, such that the end-user can select from the various configurations to preselect groups of property values (e.g., Current vs. Voltage). See the EHR110 as an example.

# Release 3.5.478

## March 2, 2016

## **Core Module**

• There are now Network Tree devices for the *b-Link* (*BACnet* stencil) and *Infinet Repeater* (*Continuum* (*Dist Ctrl*) stencil) devices that show all four ports.

- The new automatic update features introduced in Release 473 which make updates to shapes as you add, modify or delete other shapes are now options that can be turned on or off. This will help in cases where automatic updating with each action might not yield the proper result. We encourage users to experiment with these powerful features.
  - The options can be turned on and off from the Tools→Options→Designer Module tab.
  - You can adjust these settings:
    - Automatic updating of Bill of Material Shapes (on by default)
    - Running of the Auto Insert feature on Controllers (off by default)
    - Updating of Panel Devices within Enclosures (on by default)
- If you change the scaling or units on an Enclosure, the Panel Devices physically contained within it will be changed to the same scaling values.
- Panel devices with images no longer show a border around the image. The default for these shapes has been updated to not show the Part Number or Description.
- The Page Wizard form has been adjusted to better fit on smaller screens.
- The Schedule Shape updating has been improved.

# Release 3.5.477

February 18, 2016

## **Design Module**

- When a Schedule spans multiple shapes, the secondary shapes will have their font, colors and styles linked to the first shape so changes in the first shape will be reflected in the others.
- The Find and Replace Utility was not updating the list of systems after a replace. This has been resolved.
- The Drawing Assistant can now handle Visio masters with double-quote symbols in the name.
- Issues with the Terminal Blocks causing redraw delays have been resolved.

# **Release 3.5.474**

January 20, 2016

- Some issues with the auto-updating BOM shapes and Controllers have been fixed.
- The SmartStruxure AS shapes did not have the USB port shown. This has been updated.

#### **Estimate Module**

• The Compare Estimates feature was including systems that had been explicitly excluded. This has been corrected.

# **Release 3.5.473**

December 30, 2015

#### **Core Module**

- You can now upload the files in a server project from an individual folder or set of folders, instead of just the entire project.
  - Right-click on a folder and select UPLOAD CHANGED FILES TO SERVER.
  - $\circ~$  If there are sub-folders, there will be an option to upload just the selected folder or all the child folders as well.
- The number of Custom Project Properties (as introduced in Release 3.5.468) has been increased to 60 (from 25).
  - An issue with the custom version of the property name being used as a field code in a Word-based report or template has been resolved.
- There is a new option in the TOOLS→OPTIONS *PDF Files* tab that tells Studio to check the specified custom PDF paths *before* the standard PDF library.
  - This allows you to specify overriding versions of standard PDFs to use for submittals and part browsing.
  - The file name must be the same as the existing PDF to be seen as an override.
- There is a new command that adds the current project to the list of projects available from the FAVORITE PROJECTS menu. Select FILE→FAVORITE PROJECTS→ADD CURRENT PROJECT TO FAVORITES.
- The CTRL+N (NEW PROJECT) and CTRL+O (OPEN PROJECT) shortcuts were not working when the Newsfeed was displayed. This has been corrected.
- The Network Tree devices that support an Ethernet Interface now all have a property for *MAC Address*.

- The Bill of Material shape is now designed to automatically update itself as needed.
  - It should update when parts are added, removed or modified.
  - Panel shapes will recognize when they are added or removed from a panel.

- The shape will update using the current options. To update manually or change these options, you can still right-click on the shape and UPDATE BILL OF MATERIALS.
- The Auto Insert feature, used on controller shapes to find I/O Point and Sensors that reference the controller in order to fill in the controller's I/O Point and Software Tag information now runs automatically.
  - If you edit an I/O Point or Sensor shape and set (or change) its controller or point reference, the controller shape will immediately update and the wiring lines will reflect the connection.
- There is a new pair of shapes for documenting Panels.
  - The Page Add Ins stencil includes the new *Enclosure* and *Panel Device* shapes.
  - The Enclosure shape represents an enclosure or panel plane.
    - There are properties for the physical dimensions of the panel and subpanel, and a customizable scaling factor.
    - The enclosure defines a new *Panel Name* property, with which the Panel Devices are associated to define the complete panel.
    - The default Panel Name is the BOM Tag of the Enclosure, but it can be named explicitly.
    - The Enclosure totals the *Power Consumption* values from all of its parts and makes that available for display.
  - The Panel Device is meant to shape represents a device on or associated with the panel, such as a transformer or controller.
    - You can select a Part Number and BOM Tag in the Panel Device itself. This version of the shape will not have any of the custom properties or functionality that might be available in the more specific version of the shape (e.g., a controller shape allows you to specify I/O points and connections).
    - Alternatively, you can link the Panel Device shape to another existing shape in the drawing, or even in another drawing in the project or another project. Linking a part copies in the information for display on the panel device shape without creating a duplicate of the part in the Bill of Material.
    - A Panel Device shape that is located within the bounds of an enclosure will automatically be assigned to the Panel Name defined by that enclosure.
      - You can also specify that a Panel Device is part of a specific Panel explicitly.
  - You can specify an image to display on the Panel Device shape.
    - Panel Images will be added to the Parts Database for many parts over time, but you can specify your own.
  - The *Panel* Name property is available for custom part-based reports. There is a new *Bill of Materials (Panel)* report included.

- The Bill of Materials shape has a new option to organize parts by Panel Name.
- There is a new shape for the *SmartStruxure RTD-16* I/O module.
  - $\circ$  It handles both the two-wire and three-wire configurations.
- There is new shape for the *SmartStruxure USB-485-INET Interface Adapter*.
- The *SmartStruxure IO Points* report, which can be used to generate data to copy and paste in the SBO WorkBench, has been updated to conform to the layout changes in SBO 1.6 (the Input and Output channel columns were merged).
  - The version compatible with 1.4 and 1.5 is still available with a different name.
- In the Page Wizard, the *Prepend Text Tool* can now be used to prepend text to the Page Name and/or the Page System.
- The UPDATE DRAWINGS feature in the new Revision Notes tab now includes the REMOVE REVISION BUBBLES option.
- The Find and Replace tool from the Visio Design Tools menu has been updated to allow for searching for blank values.
- The Sensor shape has been updated to make the power box text font adjust properly for longer text.
- The Continuum DIO-20 and DO-20 shapes have been updated to correct an issue with the wire lines.

#### Service Estimating

- The SE Version 2.1 Import Template of Equipment and Tasks for the Service Estimating module is now available.
  - It includes 448 pieces of equipment and over 3,500 predefined tasks, including labor hours and repair costs.
  - Refer to the updated *Service Estimating User's Guide* (available from the HELP menu), specifically Chapter 3, for more details on importing service equipment data.
- There is a new property associated with each piece of equipment: *Remote Support Labor Hours*.
  - This value is similar to *Repair Labor Hours*. You can include or exclude these hours on a per system basis.
  - You can specify it in the Equipment records in Parts Database, and update the values using the import and export tools.

# Release 3.5.471

October 28, 2015

- When a server project is checked out to you, it will be indicated in the title bar of Studio.
- Excel reports will now default to saving as .xlsx files.

• Word-based reports did not properly show values extracted from the detail tables of a Design or Estimate project using the *TableName[INDEX].Property* syntax (e.g., *LaborCodes[ENG].ActualHours*). This has been resolved.

#### **Design Module**

- There are updates to the Controller shapes:
  - The new SmartStruxure *AS-P* controller is now available on the SmartStruxure stencil.
  - The SmartStruxure *DO-FA-12* shape has been updated to rename the *NOx* point names to *DOx*.
  - The MPM-VA shape has been updated to clarify the naming of the BO points.
- In the Find and Replace tool:
  - You can now search for blank system names.
- When using the Drawing Assistant (i.e., the right-click ADD SHAPES menu):
  - There is an option on the TOOLS $\rightarrow$ OPTIONS *Designer* tab to ignore the default and/or Enterprise menu item sets.
  - For the *Separable Relay*, the Part Number did not update. This has been fixed.
- The default Part Number for the MNL-800 has been updated to MNL-800-101
- In the Page Wizard's Prepend Text tool, spaces in the *Text to Prepend* were being removed. This has been fixed.
- An issue with the Sensor shape showing the Pipe immersion symbol has been resolved.

#### **Estimating Module**

- When creating a new Estimate from a Template Project, the default will be to not overlay any other Estimate Model Template.
  - If an Estimate Model Template is selected along with a Template Project, the Estimate Model will be imported. This was not the case in the past.
- Some issues with the format for the Service Task Sheet have been resolved.
- In a Service Estimate, you can specify default Repair Rates for all of the categories.

# **Release 3.5.468**

September 22, 2015

- The Setup and Administration Guide has been updated significantly.
- For Project Properties fields on project nodes (Customer Site, Job, Estimate, and Designer) now include a *Custom* tab that allows you to add up to 25 custom Project Properties.
  - $\circ$  For each custom property (1 to 25), there are actually two properties:

- *CustomValueN*, which is the value of the property (always a string).
- *CustomValueNameN*, which is the name of the corresponding property.
- There is another property, *CustomValueAdminMode*, that is used to define the custom properties.
  - When *True*, both sets of properties are shown with their actual property names.
  - When *False*, only the *CustomValueN* fields with a specified *CustomValueNameN* field are shown, and that name is used as the label.
- The Custom Values are available as part of the Header table when using the reporting tools. Each value will have two different field codes.
  - If, for example, *CustomValueName5* is "Sales Guy", then the value of *CustomValue5* will be available using either field code <*CustomValue5*> or <*SalesGuy>*.
    - The second field code is the name without spaces.
  - You can also specify an explicit field code as part of *CustomValueName5*. If it was "Sales Guy <EmpSales>", then the field codes would be <*CustomValue5*> or <*EmpSales*>, but the label on the Custom tab would still show as "Sales Guy".
- Additional changes to the Project Properties fields on project include:
  - There are also new properties for the combined City/State/Zip on the *Site*, *Building*, *Customer* and *Billing* tabs.
  - The Job Number property is available as an inherited field on the Designer and Estimate nodes when contained in a Job Folder.
  - Users who do not have a license for the Estimating module can still edit an Estimate's Project Properties.
- The TOOLS  $\rightarrow$  OPTIONS form has a new tab that lets you export some of your settings to a file so you can import them onto a different workstation.
  - An administrator can also copy a generated settings file into the server's *System Config* folder to enable the LOAD COMPANY DEFAULTS button. This is useful for configuring new machines consistently with company settings for connectivity and proxy servers.
- When generating an Automation Overview from the Network Tree, you can now select a custom template file to use.
  - Previously, the template used was the one defined for new Designer drawings.
  - The company administrator can define a template to be automatically selected for all users, in the same manner as other Designer templates, on the ADMIN→LIBRARIES, STANDARDS AND TEMPLATES *Template Files* tab.
- In the Submittal Generator:
  - When adding an additional part, the version of the PDF selected next to the VIEW PDF button is the one that will be brought into the list.

- When generating Designer drawings using the entire Designer project, any Excelbased schedule files in the project will now be generated after all the Designer pages.
- From any of the report generator tabs (Enterprise Management and Reports, Designer and Estimate), there is now a link to open the Report Template folder for easier access to create custom reports.
  - Enterprise Management reports can also now include the header fields *<ReportPrintedBy>*, *<ReportPrintDate>* and *<ReportName>*.
- Copying and pasting text from the properties tabs with the keyboard shortcuts would not work at times. This has been resolved.

#### Part Database

- The fields available in User Parts (TOOLS→PARTS→MANAGE MY PARTS), which can be created by individual end users, have been expanded.
  - You can now specify fields used in Designer shapes, specifically the Extended Properties for Sensors and Actuators.
  - You can also specify PDF files to reference as cut sheets, as well as physical dimensions.
- User parts will now appear in the Part Selectors for All Parts, Actuators, Sensors, Smart Clones and Accessories. They will be merged with the company and Smartware parts.
- At times the Part Selector forms were showing obsolete parts. This has been corrected.

#### Valve Selector and Schedule

- The Valve Selector, available from TOOLS→BROWSER VALVES AND ACTUATORS and used in the Valve Schedule features, has been updated. Some of the data for these updates may require the Parts Database to be resynchronized and published, or may not be immediately available in the database.
- The Valve Selector now gives you an option of *Imperial* or *Metric* Units.
  - Only the appropriate parts in the selected units will be shown.
  - Temperature, pressure and other calculated values will be shown in the selected units.
  - The Cv/Kv calculator will use the selected units.
  - In the Valve Schedule Template Editor, the *Part Number* column has an option on whether to default to Imperial or English units.
  - There is a new, distinct Schedule Template for *Valve Schedule (Metric)*.
- The *Actual Pressure Drop* calculations now include the *Specific Gravity* of the medium. When selecting a liquid medium, there is a choice for various Glycol concentrations that fill in the associated Specific Gravity value.
- When using a Valve Schedule from the project tree, parameters such as GPM or Poundsper-Hour will be carried back and forth between the selector and the valve schedule.

- When reselecting a valve in the Valve Schedule, there is a new option to have all of the filter values set to those of the previously selected valve.
- When filtering on the Valve Body properties, there will be options for *Is Full Port Characterized* and *Is Line Size*.

- There is a new *Find and Replace Utility* for searching for and replacing BOM Tags, Software Tags and System Names inside the shapes of a Designer drawing.
  - To access the tool while editing a drawing, select DESIGN TOOLS  $\rightarrow$  FIND AND REPLACE. For newer versions of Visio, this menu is on the ADD-INS ribbon tab.
  - You can search the current page or the entire drawing. Searches can include wildcard characters.
  - You can preview the find results before replacing, and you can select which instances to replace. Use CTRL+CLICK to multi-select rows, or click REPLACE ALL to replace all matches.
  - When searching for Software Tags, there is an additional option to update those tags to prepend the associated system name (e.g., VAV1\_DaT). Click PREVIEW CHANGES to see how these would be updated, and UPDATE SOFTWARE TAGS to make the changes.
- The UPDATE DRAWINGS feature of the new Revision Notes list has been simplified, and now includes options to select the five most recent notes or milestones, as well as a SELECT ALL DRAWINGS option.
- In the Table of Contents generator, there is a new third option to open the file as a Designer drawing, but without the Table of Contents editor window.
- When selecting parts for a Sensor, Actuator, Smart Clone or Accessory, the list will now also include any User Parts created by an individual user in the TOOLS→PARTS→MANAGE MY PARTS form.
- When adding custom accessories in a shape, you can now specify the price of the part.
- The Page Wizard has a new utility that allows you to prepend a piece of text onto the *Page Name* or *Page System* field of a selected set of page's title blocks.
- There is a new option on the TOOLS → OPTIONS *Designer* tab that allows you to suppress the default list of shapes available in Visio on the right-click ADD A DESIGNER PART menu. This should only be used if you have a custom *DS Shape Dictionary* file at the Company or Enterprise level.

# **Release 3.5.466**

July 30, 2015

## **Core Module**

- The empty background of the Studio window (when no project is open and no forms are shown) now contains a Studio360 News Feed with information about the latest features, tips, tricks and other announcements.
  - If the Show Open Project Dialog on Startup option is checked in TOOLS→OPTIONS, the newsfeed will normally be hidden immediately. You may want to disable this option in favor of:
    - The FILE  $\rightarrow$  RECENT PROJECTS and FILE  $\rightarrow$  FAVORITE PROJECTS menu items.
    - The OPEN PROJECT icon in the toolbar.
  - Regardless of the setting, the newsfeed will still be shown about once a week.
- There is a new Open Project icon in the toolbar below the main menu.
- In categorizing Multi-File Libraries, there are additional fields for the Australian Schneider offices.
- The IMPORT PROJECT PROPERTIES menu item for tree nodes now allows for the importing of numeric, date and other non-text values.
- In the Schedule Builder, specifying a Part Find Filter did not always work properly with wildcard patterns. This has been resolved.
- There were issues running reports from the NEW menu on the FILES tab using the *Custom Templates.xml* features. These have been resolved.
- When duplicating nodes, the name of the duplicated node was not always unique and the description and file type of contained files was not copied. These issues have been resolved.

- The Sensor and I/O Point shapes have been upgraded.
  - There are now additional boxes for showing a terminal number for each wire for cases where the sensor is connected to a terminal block or terminal strip.
  - You can specify a minimum font size to use for the pieces of terminal text, such that the boxes will automatically grow wider if the text gets too long.
  - $\circ$  They will now prompt you to upgrade their shapes when necessary
  - For the Sensor shape:
    - You can choose to turn off the point information side, displaying only the device side and terminals.
    - You can reduce the length of the lines denoting the terminals.
- The Accessories tab for most parts now allows for more than four custom accessories to be added.

- There is a new command of the Visio Designer Tools menu that allows you to force all BOM or Schedule Shapes to update themselves.
- For some Designer shapes (e.g. Sensor, Relay, Transformer), there is an option on the Part Properties tab to *Show All* (Parts) when you click the PART LIST button.
  - If you choose a non-standard or compatible part, the shape may not behave properly.
- When you used the right-click Drawing Assistant menu, selected the *Select an Actuator* shape, and selected an actuator, the *Select an Actuator* square was not deleted. This has been resolved.
- When point tags were entered in a controller shape, and then that point was subsequently marked as Not Active, the tags would not clear and (if there was a matching Sensor or I/O Point shape) could appear in a report. This behavior has been corrected.

# **Release 3.5.464**

July 7, 2015

- There is a new Damper Schedule for use with the Schedule Node.
  - Drag a Schedule Node into your project, or right click on a node and Select  $ADD \rightarrow SCHEDULES \rightarrow SCHEDULE$ .
  - Select the *Damper Schedule* template.
- Word reports and letters that are generated using the *Custom Template.xml* menu with the *<ProcessTemplate>* option can now be updated with the latest Project Properties after they are created.
  - Once created, you can right-click on the file and select UPDATE VALUES IN REPORT.
  - You have a choice of updating the existing document or creating a new copy with the new values.
  - You can also now use the field *<ReportPrintDate>* to insert the date the report is being run (as text, and not as a field that will update).
- There is a new Submittal Generator node that can be used to insert a report run from a Schedule Node schedule (such as a Valve Schedule, Damper Schedule or SmartChart Schedule).
  - In your Submittal Generator tree, add a *Schedule Node Report* node.
  - On the *Submittal Pages* tab, select the Schedule and then select the Report Template.
- The Lon Router Network Tree device node will now show up to four separate channel busses.
- Adding a Belimo SelectPro .BEL file to a Valve Schedule Node was not bringing in all fields onto the Schedule. This has been fixed.

- The formatting of emails displayed on the *Emails* tab has been improved, and the *Received Date* should now properly reflect local time when viewed.
- When you copy nodes from a project in one instance of Studio to another in a different instance, existing emails were not being copied. They will now copy over.
- The Schedule Node template updating feature introduced in the previous build was inadvertently disabled in that build. It has now been enabled.

- There is a new Card Reader shape in the *Sensors and Transmitters* stencil (and in the Designer right-click menu under SENSORS AND TRANSMITTERS)
  - This shape works similar to the regular Sensor shape, but allows you to browse the parts using card reader specific filters.
  - $\circ~$  It is compatible with the ACX5720 and ACX5740, as well as some I/Net controllers.
- In the SmartStruxure Module ordering tool, you can now choose Horizontal or Vertical mounting to allow for changes in available power.
- The MPM-UN shape has been updated to correct mislabeled terminals AI3 and AI4.
- The MPM-V shape has been updated to include Modbus terminals.
- When selecting a shape using the ADD A DESIGNER SHAPE→FIND BY PART NUMBER menu command in a Designer Drawing, some fields for some part numbers were not being fully set. This has been resolved.
- The redraw speed of the Schedule Chart shapes has been improved.

## **Estimating Module**

• The values for *Risk* in the *Allowances* and *Other Costs* tabs in the Estimate were not being shown correctly. This has been fixed.

# Release 3.5.463

June 9, 2015

- You can now search the node for specific text.
  - Right-click on any node in a tree and select SEARCH.
  - Enter one or more keywords and click the SEARCH button. A list of all nodes anywhere in the tree below the selected node that contains any of the keywords in its name, description or comments tab will be shown.
  - $\circ~$  Double-click a node (or select in a click SELECT) to have that node selected in the tree.

- When you add a node to a tree, the name of the node will be unique within the parent (e.g., two System nodes will now be named "System" and "System (2)" automatically). Previously all new nodes had the same default name.
- In the Submittal Generator, you can now temporarily exclude nodes from the generated document. Right-click on any node or section and select TOOLS→EXCLUDE FROM SUBMITTAL. To restore the node, select TOOLS→INCLUDE IN SUBMITTAL.
- There are new features in the Schedule Builder (and the Valve Schedule)
  - You can now update templates for a schedule and have it trigger an upgrade to existing schedules that use that template.
    - To be considered an upgrade to an existing template, the new template must have the same *Template Name* and *Template Author* and a higher value for *Template Version*.
    - When you select a schedule that has an update template available, it will be noted in red on the *Schedule* tab. If you then click the EDIT SCHEDULE TEMPLATE, there will be an UPGRADE button available.
    - The intent of the upgrade is to make fixes and add new columns. For existing column, the template will overwrite the changes that might have been made to the specific instance of the schedule, if any. Changes that will not be overridden include:
      - Any new columns added to the template will be left alone.
      - If the columns were reordered, as much as possible the custom order will remain.
      - If a column was made invisible, it will remain invisible.
  - In the Valve Schedule, the various columns that are automatically filled in and made read-only when you select an Assembly Part Number (Valve Size, Cv, etc.) will remain editable if a custom part number is specified.
  - You can now use the Belimo SelectPro software to size and select valves in a Valve Schedule.
    - With SelectPro already installed on the workstation, copy a .BEL file to the Files tab of a Valve Schedule. As usual, you can double-click the .BEL file to open and edit it (in SelectPro).
    - The valves selected in the SelectPro file will automatically be imported onto the Schedule tab of the Valve Schedule. The rows will be read-only, but if you make any changes in SelectPro the schedule will update automatically.
- You can request that Studio prompt you when you open the Project List as to whether there are projects that require uploading. In the *Smartware Studio.ini* file (from HELP→ABOUT press CTRL+ALT+SHIFT+I) add the following item:

```
[Settings]
CheckIfProjectUploadRequired = True
```

• When copying in attachment files from Outlook onto the Files tab of a node, it will now warn if the file exists and ask if you want to overwrite the original file.

- In the Windows Service, the Email Forwarding feature now allows you to have multiple servers use the same sub-domain, using an alias suffix to differentiate.
  - Examples might be *alias.ny@studio.ourcompany.com* and *alias.nj@studio.ourcompany.com*, where '*studio.ourcompany.com*' is the subdomain for both, and '*.ny*' and '*.nj*' are the distinct alias suffixes. In each case, '*alias*' is the alias assigned to a folder in a project in each server.
- In the *Open Project* dialog, when hovering over the popup window that shows key properties such as Estimate Contract amount, certain actions such as DUPLICATE PROJECT would seem to not respond. This has been resolved.
- There were cases where Studio would be shut down but still show as running in the Windows Task Manager. This has been resolved.
- The loading splash screen for the Valve Schedule was staying open when it should have closed. This has been resolved.
- Reports generated using Word templates were not keeping the page setup properties from the template. This has been resolved.
- A rare issue where permission settings can result in new nodes being added with blank text has been resolved.
- An issue running Report Group .xml files from the *Custom Templates.xml* menu has been resolved.

- The SmartStruxure Module Ordering utility has been enhanced.
  - You can now choose to include modules on one page, instead of just the entire drawing. This can be used to separate multiple sets of devices tied to separate Automation Servers.
  - There is a new option to hide or show the labels that appear on the sides of the modules referencing the modules that come before and after. This is useful if you want the drawing to show them stacked horizontally as they would be when installed.
  - There is an option to reduce the power available from a PS by a certain percentage to ensure that the system will have enough power.
- The Create WorkPlace Tech Applications tool has been updated. Certain part numbers and S-Link sensors were not being handled properly.
  - The MNB-70 and MNB-1000-15 are still not available, due to an issue with WorkPlace Tech itself.
- Some minor issues with the new Title Block form have been resolved.
- An issue with the Project Property labels on a Table of Contents drawing not updating when the file was opened has been resolved.
- The Terminal Blocks Extra stencil should no longer be overwritten with an updated installation.

#### **Estimate Module**

- The PM Hours Worksheet has been extended to include a calculation based on the other calculated labor hours.
  - In the LABOR SETTINGS or ESTIMATE SETTINGS, the *Labor Codes* tab has a new column, *PM Hours Factor*, which specifies how many PM hours to calculate for each hour of that Labor Code
    - E.g., specifying 0.1500 for this value in the ENG row indicates to add 1.5 additional hours of PM for each 10 hours of Engineering.
  - The *PM Hours Worksheet* tab will show the total of these hours. You must check the box *Percent of Labor* checkbox to have these hours included.
    - The hours used in the calculation are before *the Global Labor Adjustments* are applied.
    - You cannot apply a factor to the PM Hours themselves.
  - Be sure that all users are on the current release when using this feature. If an older version of Studio is used to edit the Estimate, these calculated hours will disappear and the user will receive a message about calculation issues.
- On the *Expenses/Allowances* tab, you can now supply custom descriptions for the *Service Agreement*, *Risk* and *Overhead* values. These descriptions will also carry over to the Estimate Summary reports.
  - If you have a custom version of an *Estimate Summary* report, you may need to change it accordingly. Refer to the new version as an example.
- There is a new report, *Parts Database Labor for Equipment*, which exports all the service equipment from the Parts Database (not from the current Estimate) with the total amount of labor for each of the levels.
- If all or most of the systems in an estimate were excluded, such as to calculate different pieces of an estimate as options for the customer, the details associated with a vendor (*Assign to Subcontract, Sell Price Multiplier*, and custom *Cost Escalations*) could be lost. This has been resolved.
- When extracting an Estimate using the TOOLS→EXTRACT TO NEW PROJECT tool, there were cases of elements of the estimate, such as subcontracts, that were not carried forward. This has been resolved.

# Release 3.5.461

May 13, 2015

- There are new features when browsing Multi-File Libraries to insert files:
  - You can now preview a file without adding it to the project. Right-click on the file in the file list and select VIEW FILE.
  - To make it easier to insert multiple files from different libraries at once, there is a new checkbox at the bottom to CLOSE THIS WINDOW AFTER INSERT. If you uncheck it, the form will remain open until you click CLOSE.
- There are new features on the Submittal Generator Reports node:
  - There is a new option on the *Properties* tab to control how the output of multi-tab reports (such as Designer Controller Checkout sheets) appears on the Index pages and Bookmark tree.
    - *Show as Single Index Item* (the default) shows the entire report as a single item named for the report.
    - *Show as Multiple Index Items* treats each output tab as a separate report, merging them at the same level of the index with the other reports being generated and using a combination of the report name and the tab name in the index.
    - *Show as an Index Node with Multiple Items Below* combines the two, showing the report name at the same level with the other reports being generated, and adding each tab as a node below it using the tab name.
  - For the selected project, there are two new options for (*Generic Design Project*) and (*Generic Estimate Project*).
    - These can be used when creating template projects, as you can now select the list and order of reports without selecting an actual project.
    - Changing projects (without changing the type of project) will now leave the report list unchanged.
- You can now create a folder on your Company (and Enterprise) servers that distribute any types of folders and files to your end-users' *My Documents* folders.
  - Copy the files and folders to be distributed to the [SERVER FOLDER]\Resources\My Documents on your Company Server.
    - You can access this folder easily from the ADMIN→LIBRARIES, TEMPLATES AND STANDARDS tool on the *Other Distributable Files* tab.
  - For multi-server Enterprises, copy the files and folders to the *[ENTERPRISE FOLDER]\My Documents* folder.
    - You can access this folder easily from the ADMIN→ENTERPRISE MANAGEMENT AND REPORTS tool on the *File Distribution* tab.

- Users will <u>not</u> receive these files by default, and <u>must opt-into</u> receiving them.
  - On the workstation, go to TOOLS→CHECK FOR UPDATES and click the Options button.
  - Check the box next to *Company 'My Documents' Files*.
- The files are downloaded as part of the Background Updater, which normally runs with the first launch of Studio each day.
  - The TOOLS  $\rightarrow$  CHECK FOR UPDATES tool can force the download at any time.
- The *Recall.txt* feature is available to remove folders and files at both company and enterprise levels. Refer to earlier Release Notes by searching this file for 'Recall.txt'
- You can specify a list of files that should be removed from the workstation when the folders are synchronized.
  - Create a file named *recall.txt* in any distribution folder on the server.
  - In this file, list the names of the older files (one per line) that were distributed that you want removed from the corresponding folder on each workstation.
- An issue where local projects would not auto-save the first time you opened them has been resolved.
- In the TOOLS→PARTS→MY PART IMAGES list, you can now Export the list of images to Excel.
- In the Enterprise Management's Scan Nodes, Project Statistics report, and Copy Files utility, there are now progress bars to indicate the servers, projects and files being processed.

- When drawing files are saved, the Visio file's Document Stencil is optimized to remove unused information and reduce the file size.
  - You can do this function explicitly from the new Visio DESIGNER TOOLS  $\rightarrow$  OPTIMIZE DOCUMENT STENCIL menu command.
  - You can turn off this behavior from the TOOLS  $\rightarrow$  OPTIONS Designer tab.
- There is a new shape for the Schneider Electric SE8600 Room Controllers.
  - It can be found in the *SE Room Controllers* stencil, or the ADD A DESIGNER SHAPE  $\rightarrow$  ROOM CONTROLLERS menu in Visio (when you right-click on an empty area on the page).
- The ACX5720, ACX5740 and the I/NET SCU-1284 will now properly auto-insert point information from an I/O Point configured as a Card Reader point

- The Revision Notes feature has been significantly enhanced:
  - There is a new table of Revision Notes that is stored with the Design project itself, and not just in the Title Blocks of the Designer drawings.
    - The notes now include additional properties, such as *Revision Number* (in the 1.2.3 format), *Is Milestone* and a more descriptive *Revision Detail*.
    - The *Revision Number* will define the order of the revisions (e.g., 1.1.1 comes between 1.1 and 1.2), so will allow for inserting revisions.
  - There is a new tab page on the Designer root node for viewing, editing and adding the *Revision Notes*.
    - The table is stored in the Design node, so the project will need to be checked out to edit the notes.
    - There is a new UPDATE DRAWINGS tool available from the Revision Notes tab. This replaces much of the functionality of the existing Revision Notes tool.
  - The Title Block form has been updated to support the new Revision Notes.
    - There is a separate tab for the *Revision Notes*.
    - In filling in the five slots on the Title Block shape, you can select from the project's Revision Notes in a number of ways, as well as continuing to use custom notes for each drawing.
    - When using the project's Revision Notes, the drawing's title block will automatically update the Revision Note if the project's Revision Note text is changed.
  - There is a new *Revision Notes Schedule* shape that can be added to the drawing to list all the Revision Notes from the project on a drawing.
    - It can be found in the *Page Add Ins* stencil, or the ADD A DESIGNER
       SHAPE→PAGE ADD INS menu in Visio (when you right-click on an empty area on the page).
- The Print Manager's file selection form shows the Revision Number of the latest Revision Note shown on each page's Title Block.
  - You can also select pages based on a range of Revision Numbers
- The Table of Contents Editor has been updated to support the new Revision Numbers.
  - The Revision Number of the latest Revision Note is shown for each page.
  - The *Format String* for the entries include two new options:
    - &r shows just the Revision Number (e.g., "1.2.3")
    - &R shows the phrase "(Rev. 1.2.3)"
- The Submittal Generator's Drawing File Index Page has been updated to support the new Revision Numbers.
  - The Revision Number of the latest Revision Note is shown for each individual page in the list (but not for Folders or Projects).
  - There is a new option on the Properties tab to *Show Revision Number on Index for Individual Pages*.

- There are new versions of the Revision Bubble Shapes
  - If you double-click the new shape, you will have the option of entering a custom number or choosing an existing Revision Note from the project.
  - If the selected Revision Note is in the current page's title block, the number in the triangle will be updated with the corresponding number (from 1 to 5).
  - If the Revision Note is not in the title block, the number will change to an asterisk and a floating text label will appear saying "Revision 1.2.3 (see table)"
  - If the Revision Notes on the title block are updated using the Revision Notes tool or Title Block editor, the triangle number and label will be updated accordingly (if the associated revision is added to or removed from the title block)
- An issue with the Schedule Shape not resizing empty cells properly has been resolved. Another issue with it offering to link to Schedule nodes outside of the Design project has also been resolved
- And issue with the Schedule Shape Smart Charts not seeing the values in the System Column and possibly improperly sorting parts into the System tree systems has been resolved.
- An issue with the list of selected files for reporting not working properly in cases where there were multiple Design projects in a single project has been resolved.

# **Estimate Module**

• An issue on the System node, where typing in a value for *Typical Of* too quickly caused the cursor to move as the number was being entered, has been resolved.

# Release 3.5.458

April 17, 2015

- You can now use Studio with the Windows *Custom Text Size* (DPI) settings above 100%.
- In the Submittal Generator, when adding a Manual PDF item to a Part Information Sheets node, if the file was not available at the time the entry was made it showed 'Not Found' and did not properly refresh when the PDF file was added to the Files tab or PDF library. This has been resolved.
- The Schedule node and Schedule Builder features have additional features:
  - Part rows, such as in a Valve Schedule, can have accessory rows.
    - Accessories rows are numbered automatically (e.g., 2.1, 2.2, 2.3) and move with the parent row.
  - You can multi-select schedule rows to move, copy and delete rows.
  - You can copy and paste rectangular regions to and from Excel into the Schedule.
  - You can create a column of System Names that pull from a Designer or Estimate project.
  - There is a menu command to duplicate a row.

• There is an option to freeze a number of leftmost columns

#### **Design Module**

- The drawing scanning and been further optimized for speed and reliability.
- In the DS Shape Dictionary file that drives the pop-up menu of shapes (as described in the notes for Release 3.4.453), you can now put an underscore character ("\_") in front of the menu text at any level to create a menu separator before that item in the menu.
  - For example, using "I/A LON|\_DUIC-5P" puts a separator before the DUIC-5P sub-item in the I/A LON menu item.
- The Smartware Digital Point Cards can now be found in the Designer Shape menu under SMARTWARE POINT CARDS.
- When running the Error Checks from an open drawing, selecting a shape will automatically make Visio the front window
- When there were multiple Design nodes in the same project, switching between the two did not properly refresh the list of available or selected files or systems. This has been resolved.

#### **Estimate Module**

• When using the TOOLS→IMPORT SYSTEMS FROM EXCEL (or DESIGNER), the SELECT ALL and UNSELECT ALL buttons now work properly.

# Release 3.5.456

March 27, 2015

#### Reporting

- The Reports tab on Design and Estimate nodes have been enhanced.
  - You can now use Word files as templates for creating mail-merge style forms, letters and documents.
    - You can use the same *<FieldCode>* format in the document for specifying the values to replace in the template that is used in the Excel-based reports.
  - You can now create a selection in the report list that causes multiple reports to be run as a group.
    - Create a text file in the appropriate Reports sub-folder and name it with a *.xml* file extension (e.g. *Favorite Reports.xml*)
    - The format of the file is a simple Xml file:

```
<Reports>

<Report>Estimate Summary.xls</Report>

<Report>Material List (By Manufacturer).xls</Report>

<Report>Labor Hours (By System).xls</Report>

</Reports>
```

- You can specify a list of reports that you do not want to be shown in the report list.
  - Create a text file in the appropriate Reports sub-folder and name it *Reports to Hide.txt*. In that file, list the names of the files (with file extension) that you do not want to be shown.
- The new files should be places in the same folders as the Excel reports,
  - [APPDATA]\Reports\Estimating or [APPDATA]\Reports\Design.
  - The *APPDATA* folder can be found from the TOOLS  $\rightarrow$  OPTIONS  $\rightarrow$  LOCAL FILES tab.
  - You can distribute these new types of files, as you can custom Excel reports, by copying them into the corresponding server folders: \Resources\Reports\Estimating and \Resources\Reports\Design
- You can now view the raw Data Sources that are being used in the reports without running a report. This can be useful when you are customizing a report or creating your own.
  - Click the VIEW DATA SOURCES button at the bottom of the tab.
- The *System Comparison* report, which compares parts and points between two system trees (e.g., a Designer system tree and an Estimate), has been enhanced to include a comparison of the total material.
  - Right-click on one of the system trees and select TOOLS  $\rightarrow$  SELECT FOR COMPARE SYSTEMS. Then do the same for the second tree.

- There is a new feature, *Enterprise Management and Reports*, which can be used to generate new types of reports of information about all the projects and files on the server.
  - Those with administrative rights can access this feature from ADMIN→ENTERPRISE MANAGEMENT AND REPORTS.
    - It has previously been available to a small set of user companies as ENTERPRISE MANAGEMENT. Those features have been fully incorporated into this new version.
  - The Enterprise Management reports include:
    - Lists of Users, Licenses and Projects
    - A Project Statistics report
      - To utilize this report, you need to scan the nodes in the database to gather additional information. Click the SCAN NODES button to update as needed.
  - If your organization has multiple servers
    - You can choose to report on any or all of the servers separately or as groups by checking them in the Account list.
    - You can use the *File Distribution* Tab to copy custom files and resources from a master *Distribution Folder* to the individual servers.

- The new features described in the earlier Reporting section apply to these reports as well.
- There are five new Title Page templates to use with the Submittal Generator. They can also be copied and modified to create custom title page templates.
- More of the Network Tree devices for the PC Network have a Software bus (e.g., Laptop, Workstation).
- The memory usage and time used when browsing or inserting from a Multi-File Library has be significantly reduced.

## **Estimate Module**

- The *Reports* tab has been enhanced with new features. Refer to the earlier section on *Reporting*.
- When you add a part package to a system, any comments is the package will be copied to the comments tab of the system.
- In some cases the generated Service Contracts were being saved without the .doc file extension, which made them appear as "Local Drive".

#### **Design Module**

- The *Reports* tab has been enhanced with new features. Refer to the earlier section on *Reporting*.
- Using the Undo command in Visio when editing a Designer drawing caused an error. This has been addressed.
- The i2865-V and i2866-V shapes have been updated to correct the display of the dip switch settings. You will be prompted to update any existing versions of these shapes when you double-click them.
- Some combo sensors, including the newer MN-S sensor, would not be updated if the BOM Tag of the controller they were on was changed. This has been fixed.

# **Release 3.5.454**

March 9, 2015

- You can import a set of Project Property values (e.g., Customer Name, Project Manager) from a simple spreadsheet onto any Project Node (Site, Job, Estimate or Design).
  - Right-click on the node and select IMPORT  $\rightarrow$  IMPORT PROJECT PROPERTIES for details on the format of the import file.
- There are additional Project Properties for Customer Address and Billing Address and information.

- In the Submittal Generator Files node, you can now right-click on a file reference in the list and open the file from its actual location. You can also now add references to *.docx* and *.xlsx* files.
- An issue with the Automation Overview devices appearing in the wrong order has been resolved.
- A memory issue that occurred when browsing the parts has been resolved.

- The Compare Systems report now has a new option for comparing the total list of material. The reports are also now sorted by Part Number.
- The *SE iPortal Import Sheet* report was generating a tab name other than the required 'Sheet1'. This has been fixed.

#### **Estimate Module**

- The SE Version 1.1 Import Template of Equipment and Tasks for the Service Estimating module is now included.
- The Compare Systems report now has a new option for comparing the total list of material. The reports are also now sorted by Part Number.
- A few minor errors have been resolved:
  - The SE iPortal Import Sheet report was generating a tab name other than the required 'Sheet1'. This has been fixed.
  - If you added additional trips to the *Travel* tab, the *Estimate Summary* report did not include these costs. This did not affect the calculations shown on the screen, and all other values on the report (e.g. *Contract Amount*) were still correct.
  - If you used *Sales Tax* calculated on a base of *Contract Amount*, but selected specific elements (e.g., Material but not Labor), the Sales Tax could have been miscalculated. This has been fixed.
  - If you used custom markups on labor, then when the estimate was reopened you may have received an incorrect warning of a calculation change. There was no problem with the calculation. The error message was incorrect.

# Release 3.5.453

February 20, 2015

- The Studio splash screen will no longer stay on top of all other windows while it is shown. If you click another application, it will disappear.
- The Open Project form has a new SEARCH box for searching through Local Files.
- The SEARCH box on the *Files* tab will now remember your most recent searches.

• The number of items it remembers can be set by adding the following item to the *Smartware Studio.ini* file:

```
[Settings]
FileSearchHistoryCount=10
```

- When browsing parts, double-clicking a row in the part list will bring up additional detail (equivalent to right-clicking and selecting VIEW PART)
- There are two new menu commands for server files:
  - SEND TO  $\rightarrow$  MAIL RECIPIENT AS STUDIO SHORTCUT creates a Studio shortcut of the selected file and attaches it in an email send form. If the recipient opens the attachment, the file will be open through Studio on their machine.
  - SEND TO  $\rightarrow$  MAIL RECIPIENT WITH REQUEST TO SIGN is similar, but includes a request and instructions for the recipient to sign the file in Studio.
- There are new menu commands for folders in server projects:
  - SEND TO→MAIL RECIPIENT AS STUDIO SHORTCUT creates a Studio shortcut of the selected folder and attaches it in an email send form. If the recipient opens the attachment, the project will be open in Studio on their machine and the same folder will be selected.
  - For Estimate nodes only, SEND TO→MAIL RECIPIENT WITH REQUEST TO SIGN is similar, but includes a request and instructions for the recipient to sign the Estimate in Studio.
- You can now add menu commands to the NEW menu that run reports from a Designer or Estimate project.
  - In the *Custom Templates.xml* file, you can add the following elements to the <TemplateFile> node:

```
<TemplateFile>

<TemplateFile>

<Description>Reports-All Projects and Reports

<p
```

- The *Description*, *MenuPath* and *MenuSection* elements work the same as with Template files.
- The *EstimateReports* and *DesignerReports* elements can be "ALL" or the name of one or more reports, separated by semi-colons

<EstimateReports>Estimate Summary.xls</EstimateReports>

• If *ShowAllProjectsOnMenu* is *True*, the menu will contain a separate sub-menu item for each Designer and/or Estimate node in the main project. If its *False*, or

left out, the menu item will only show up if the selected node is part of a Designer and/or Estimate project.

- If *ShowReportListOnMenu* is *True*, the menu (or each project sub-menu item) will contain a separate sub-menu item for each available report (based on the *EstimateReports* and *DesignerReports* settings. If *ShowReportListOnMenu* is *False*, or left out, selecting the menu item (or the project sub-menu item) item will run all the specified reports.
  - If *ShowReportSelector* is *True*, an additional menu item will be added to the top of the report list sub-menu that brings up a form that allows the user to select any of the appropriate reports to run.
- o If SaveAsDocument is True, the file will be saved as an Excel or Word document.
- If *SaveAsPdf* is True, the file will be converted to and saved as a PDF file.

#### Parts Database

- When synchronizing to the Smartware database, the date of the *Current Version* will be updated even when the *Version Number* is not.
  - Since changes are made to the database in between version numbers, this will better show when synchronizations were made.

- An issue in recent builds that caused actions in larger Visio files to take a long time has been resolved.
- The Designer splash screen will now only remain visible for three seconds.
- There is a new menu of shapes to make it faster to add Designer shapes to your drawings. If you right-click in the blank area of a drawing, you will see the new ADD A DESIGNER SHAPE menu.
  - There is a FIND BY PART NUMBER option that will display the Parts list with an additional column, *Shape Available*, to indicate which parts have corresponding Designer shapes. Selecting a part will drop its shape on the drawing.
  - In addition, the existing shapes have been organized into a new menu structure. Select an item and the shape will be dropped from the appropriate stencil and the Part Properties dialog will be open automatically.
  - This structure is customizable at the User, Company and Enterprise levels by creating custom Excel files your own shape definitions.
    - The template for the definition is the *DS Shape Dictionary.xls* file located in the [*APPDATA*]\*Databases folder*.
    - You should copy this file into your [APPDATA]\Custom Templates folder as *User DS Shape Dictionary.xls* to add your own menu items.
      - Using the existing items as examples, create rows with the *Stencil Name*, *Master Name* and *Menu Path* columns filled in.
      - The *Bom Tag*, *Part Number*, *Note*, and *Trade* columns let you preset these values in the dropped shape.

- The *Open Shape Form*, *Open Part Find Form* and *Run Shape Action* columns let you control what happens after the shape is dropped on the page.
- All other columns can be ignored.
- You can also create *Company DS Shape Dictionary.xls* and *Enterprise DS Shape Dictionary.xls* and distribute them from your server as you would other custom template files.

# **Estimate Module**

- The descriptions of the labor codes are now editable
  - You can edit them from the ESTIMATE SETTINGS and LABOR SETTINGS forms.
  - The changes become part of the Estimate Model, and will be included if the Estimate Model is exported as a template.
  - The new descriptions will appear on reports such as the *Estimate Summary*.
  - The Labor Codes themselves cannot be changed.
- The widths of the panels of the *Summary* tab of the Estimate node can now be adjusted more freely.
- An issue creating Service Estimating Task Sheets has been resolved.

# **Release 3.5.452**

January 22, 2015

- The UPLOAD ALL button on the Project List form is now available.
  - This will check all the files in any projects that were opened, but not updated when they were last closed, either because the network was unavailable or you chose not to upload).
  - Any files that need to be uploaded will be, unless there are any that would cause a file conflict. In these cases you will need to open the project individually and choose to upload change so that you can
- The COPY CHILD ITEMS (OR DEVICES) menu command is now available on most project and network tree items, including network tree buses.
- There is a new menu item, VIEW→PROPERTY NAMES that, when checked, causes the internal name (e.g. "ProjectName") of each property to be shown in brackets on the Properties tab. These names are used when creating custom reports.
- All Submittal Generator nodes now include an option to Suppress First Title Page.
- In the Submittal Generator *Files* tab, you can now right-click and open a file that is stored on a different tab but referenced in the list.

- There are some new features in the Submittal Generator's *Part Information PDFs* node:
  - There are two new options for the *Cutsheet Version* setting: *Submittal (or Installation)* and *Installation (or Submittal)*. These variations indicate which version to use, but also to use the other version if the first isn't available.
    - The previous options of *Submittal* and *Installation* chose only the selected version, and will ignore any parts that didn't have that version specified in the parts database.
  - You can create custom, annotated versions of any of the PDFs.
    - Right-click on the PDF file in the list and select EDIT COPY OF PDF.
    - A copy of the PDF from your PDF Library will be saved on the Files tab of the Submittal Generator node and the PDF File Found column will note "Custom".
    - The PDF will be opened using the application specified on the *Third Party Software* tab of the TOOLS→OPTIONS dialog in the *PDF Editor* section. Recommendations for free annotating tools are included.
  - You can choose to exclude any of the PDFs that were automatically included from the Design or Estimate project. Simply uncheck the checkbox next to the file name to exclude it.
  - You can create completely custom ordering of the PDFs, ignoring any of the other Sorting options.
    - Check the ALLOW CUSTOM SORTING checkbox, then use the Up and Down arrow buttons to reorder the files.
  - You can add your own records to the PDF list to insert any other PDFs you need.
    - Click the ADD ADDITIONAL PDF button to add a new record. Use EDIT ADDITIONAL PDF and DELETE ADDITIONAL PDF to change these records.
    - If the Additional PDF is not already in the PDF library, it must be copied onto the Files tab of the node.
- There was a rare issue where a non-standard Australian date format would cause problems with the license registration. This has been resolved.

• The Select an Actuator shape was not properly generating the electric actuator parts. This has been corrected.

# Release 3.5.451

December 30, 2014

#### **Core Module**

• The Project and File database tables are now indexed to improve performance when opening the project list.

- The TOOLS→BROWSE ALL PARTS browser form is now cached and will reload much faster after the first load.

## **Estimating Module**

- You can now create estimates for Service Contracts using the new Service Estimate features of the Estimate Module.
  - These features are available to all licensed users of the Estimating Module.
  - Additional Parts Database setup is necessary to load the lists of Equipment and Tasks.
  - Refer to the new *Service Estimating User's Guide* available on the Help menu for full details.
- There is a new Company-wide option that will remove the choice of 'Default' from the list of Estimate Model templates that the user can choose from.
  - This option is intended to be used if you have created custom model templates and want the users to be forced to choose one of them.
  - To enable this restriction, on the TOOLS→OPTIONS→ESTIMATING MODULE tab, check the new DON'T OFFER 'DEFAULT' TO USERS checkbox.

#### **Design Module**

- The CREATE WORKPLACE TECH APPS tool has been updated to use the latest version available with WorkPlace Tech 5.8.
  - This includes support for the MNB-70 controller.
- The Part Properties form for the i2624 controller did not always show all 24 UI fields without being cut off. They have now been moved to two tab pages.
- The Valve Legend tool now properly picks up valves from the new Schedule node.
- The Page Wizard has a new option to copy the Page Name to the System Name column.

#### Parts Database

• The *Custom Manufacturer* name in User Parts is now coming through properly.

# **Release 3.4.448**

October 27, 2014

- In the Submittal Generator, it is now possible to sort product information datasheets with Schneider Electric as the first manufacturer.
- An issue relating to using the Submittal Generator with Word 2013 has been resolved.

• There are updates to the I/A BACnet and I/A Lon shapes. Users will be prompted to upgrade automatically.

# **Release 3.4.442**

September 10, 2014

#### **Core Module**

• Administrators can now configure workstations to prompt for a different user

# **Release 3.4.441**

September 3, 2014

#### **Core Module**

- Administrators can now configure workstations to prompt for a different user account when it downloads and runs updated versions of the Studio installer. This can be needed in cases where the user's regular account does not have sufficient privileges to run the installer.
  - New versions of the installer's MSI file are downloaded and launched by the Background Updater, which normally runs once on the first launch of the day.
  - To force the installer to prompt for a new User Name and Password, add the following to the *Smartware Studio.ini* file found in the user's APPDATA folder:

```
[Application]
MsiPromptForUser=True
```

#### **Estimate Module**

- The Estimate Summary tab has been reoriented for easier viewing of information.
- There is a new feature that allows to specify Custom Markups for material and labor.
  - On the Estimate's MATERIAL / MATERIAL BY LABOR tab, you can specify a Custom Markup percentage for all vendors as well as individually for selected vendors.
  - On the ESTIMATE'S LABOR / COST ESCALATIONS (now COST ESCALATIONS AND CUSTOM MARKUPS) tab, you can specify a Custom Markup percentage for all labor as well as individually for selected Labor Codes.
  - If you specify a Custom Markup, the cost of that material or labor will be excluded when calculating the markup on the rest of the Estimate. This other markup is referred to as *Ordinary Markup*.
If you specify a Custom Markup of 0%, no markup will be calculated on that material or labor, but its cost will still be excluded from the calculation of Ordinary Markup.

#### **Design Module**

- The Error Checking feature has been enhanced and improved.
  - There are now options to include or exclude each individual error check.
  - For the Duplicate Bill of Material Tag error check, there are now options to ignore parts where the *Show On Bom* box is unchecked, and to specify a list of tags to ignore.
  - When running the error checks from within an open Drawing File, the REFRESH LIST button now properly rescans the drawing.

## **Release 3.4.440**

August 26, 2014

## **Core Module**

- The Generate Automation Overview tool now allows you to use smaller shapes on the Ethernet network.
- The Project Properties now include a field for *Customer Contact Email* address.
- There is an updated version of the Studio Windows Service that can be installed on a server to achieve some specific features:
  - Emails can be sent to a designated subdomain of your company to have them forwarded into specific folders in specific projects.
  - Administrators can be notified each time a user creates, updates or views a password stored on a Device's Passwords tab.
- The new service is distinct from the previous Email Forwarding Service. If you've installed the older one, you should disable and uninstall it from the Windows Control Panel (it was called *SmartwareStudioService*), before installing the new one directly from the Service Control tab of the Studio ADMIN→WINDOWS SERVICE management tool. Refer to the chapter in the *Setup and Administration Guide*, *The Email Forwarding Service*, for more details on the general functionality and use of the service.

- There is a new version of the MN-Sx sensor in the *Sensors and Transmitters* stencil that properly links to the S-Link connector of the MNB and MNL controllers. This is not an automatic upgrade from the older shape, so you will need to replace it manually.
- There are minor updates to the Continuum 850, 851 and 853 (two terminal labels were swapped) as well as the *SE I/A BACnet* and *SE I/A Lon* controllers for the S-Link connector. The shapes will prompt you to update automatically when you select their properties.

#### **Estimate Module**

- There is a new *SE iPortal Import Sheet* report for bringing a material list into the iPortal system.
- When updating the pricing in an Estimate using the Material / Update Parts to Database tool, it will no longer erase a custom price that has been specified by the user if the List Price in the database is zero (e.g., it was a placeholder Part, such as RUSKIN DAMPERS).
- The Estimate properties now include a field for *Estimate Prepared By Phone* number, which appears on all the SE Service Estimate documents.
- There is a new option for calculating the *Sales Tax Base* on the Contract Amount less any combination of Material, Labor, Subcontract and/or Expenses.

## **Release 3.4.439**

July 8, 2014

- You can now copy and paste multiple selected nodes from the project or network trees at one time.
  - From any node, right-click and select COPY CHILD ITEMS. You will be given a list of all the child nodes. You can use SHIFT+CLICK and CTRL+CLICK to select any combination of them.
  - Click COPY SELECTED ITEMS to copy the list of nodes to the clipboard.
  - Use the PASTE command to paste all of the nodes onto a different node. All of the nodes must be valid children of the destination node. If not, the PASTE command will not be available.
- There are new Network Tree shapes for a Modbus Gateway, a Modbus RS232 Device, a BACnet Gateway and the Xenta 104-A controller.
- The *SerialNumber* property has been added to the Properties/Details tab for all Devices.
- The Generate Automation Overview tool has been enhanced:
  - You can now optionally hide the Bus descriptions on the connectors between devices.
  - For Custom Text, you can now show any property of the device by enclosing it in angle brackets, such as <Name> or <SerialNumber>
  - There is a new special property, <IP>, which displays the private or public Host Name or IP Address (with Port Number)
  - For devices that have IP addresses and no other defined device address, the <DA> (Device Address) property will automatically show the same value as <IP>.

• There were some issues relating to checking projects in and out from the File menu where you would be told you needed to close and open the project. These have been resolved.

#### **Estimate Module**

- You can now Include or Exclude multiple Areas or Systems from your estimate at one time.
  - From the Estimate or an Area node, right-click and select TOOLS→INCLUDE/EXCLUDE CHILD ITEMS. You will be given a list of all the child nodes. You can use SHIFT+CLICK and CTRL+CLICK to select any combination of them.
  - Click INCLUDE SELECTED ITEMS or EXCLUDE SELECTED ITEMS to change the status of the selected items.
- When extracting individual Itemized Expense Codes into a report (as shown in the *Estimate Report Field List* report), you can now use a trailing asterisk to group similar codes together (e.g., ExpensesItemized[TOOL\*] to include TOOL and TOOLS). The Expense Codes are also now case insensitive, so "TOOL", "Tool" and "tool" are all considered the same.
- You can now import and update multiple Tax Rates at one time in the Parts Database Manager.
  - From DATA TABLES→TAX RATES, click EXPORT RATES to create a spreadsheet with the existing Tax Rates. This format can be used as a template for importing new Tax Rates as well.
  - Click IMPORT RATES to import a list of tax rates in the correct format (two columns named *TaxRateName* and *TaxRate*). If there are new rates listed, they will be added. If there are existing rates and the OVERWRITE EXISTING ENTRIES checkbox is set, the existing rates will be updated with the new values.
- There is a new *Estimate Summary for Customer* report, which follows the same format as the *Estimate Summary*, but calculates all the costs by increasing them proportionally such that they add to the Contract Amount.
  - Taxes on direct costs are excluded from the report and the calculations.
  - This report is different from the *Open Book Pricing Worksheet*, which uses the Sell Prices for Material, Labor and Subcontract specified in the Estimate.
  - The actual costs are in hidden rows and columns, so this report should be printed or generated to PDF, and not distributed as an Excel file.

- There is a new shape for the Xenta 104-A controller in the SE Xenta stencil.
- An issue with the Custom Cost specified in a shape not propagating to the reports and System Tree has been resolved.

May 12, 2014

## **Core Module**

- You can now control which of the downloadable resources (Part Information PDFs, Multi-File Libraries) are automatically copied to your workstation.
  - From TOOLS  $\rightarrow$  CHECK FOR UPDATES click OPTIONS; or
  - From TOOLS  $\rightarrow$  OPTIONS, go to the *Local Files* tab and click DOWNLOAD OPTIONS.
- When exporting folders to Windows, you can choose to remember a default destination folder.

## **Design Module**

- There is a new shape in the SE Room Controllers stencil for the SE8300 Series.
- In the Error Checking feature, you can now export the error list to Excel.

#### **Estimate Module**

- There is now the ability to break down a Labor Code into several sub-classifications using *Labor Sub-Codes*. For example, you could create three sub-codes of CTS called CTS-Wiring, CTS-Configuration and CTS-Checkout. You cannot use these labor codes individually within the Estimate. Instead, you specify a breakdown of percentages for each sub-code and the Estimate will:
  - (a) Automatically calculate the weighted average for the Cost Rate and Sell Rate.
  - (b) Apply the weightings to the end results of the Estimate (e.g., Total Hours, Total Cost) and make them available for custom reports, such as Booking Sheets.
- To specify Labor Sub-Codes:
  - From the Estimate's *Labor/Total Labor* tab click LABOR SETTINGS, or from the Estimate's *Summary* tab click ESTIMATE SETTINGS.
  - Select the labor code for which you want to create sub-codes and click the EDIT LABOR SUB-CODES button at the bottom of the form. There you can add any number of sub-codes.
  - For each sub-code, you specify a name for the sub-code (e.g., "CTS-Install"), as well as the percentage of time for that labor code that should be allocated to the sub-code. You also specify the hourly Cost Rate and Sell Rate for the sub-code.
  - The total percentages for all the Sub-Codes must equal 100%. The effective Cost and Sell Rates for the main Labor Code will then be frozen at the weighted average of the values specified for the sub-codes.

- To extract individual Sub-Code values on an Estimate report:
  - Refer to the notes in the *Estimate Report Field List* report under the *Labor Codes Table* section. It shows how to use expressions such as "<LaborCodes[CTS].TotalCost>" to put specific values on a report.
  - For Labor Sub-Codes, you would substitute the Labor Sub-Code name, as in "<LaborCodes[CTS-Install].TotalCost>"
- You can now copy and paste one or more part and/or point records from one System node to another, including between different projects running in different instances of Studio. Hold CTRL or SHIFT while clicking for multiple selection.
- The Cost Escalations for Labor and Material now allow you to have up to 10 periods instead of 5. Check the SHOW TEN ESCALATION PERIODS checkbox to view the extra periods.
- The *SE Project Data* tab has a place for the *FieldCentrix (Fx) Service Agreement Number*.

April 2, 2014

- There is a new Administrative tool for viewing the logs of Device Password views and changes (*Device Passwords* are those stored on the *Password* tab of a Network Tree device).
  - If you are an administrator, you can access it from ADMIN $\rightarrow$ SERVER CONFIGURATION AND TOOLS menu, on the *Device Passwords* tab.
  - Reports can be filtered by user, date and project, and can be exported to Excel.
- On the Network Tree, the SmartStruxure Power Supply can now be added in-line on the AS I/O bus.
- There is a new setting on the TOOLS  $\rightarrow$  OPTIONS *Connectivity* tab that allows you to define the minimum connection speed threshold for Studio to download larger files.
- The following bugs were fixed:
  - If you checked out a project from the FILE menu after it was already open, it did not explicitly check to see if someone else had checked it out and checked in a new version since you had opened the project, making your version out of date and potentially overwriting the other person's changes.
  - When dragging or copying multiple emails onto a node, meeting appointments or other non-message files could cause the copy to ignore some emails.
  - When files in local projects or new files in server projects were deleted, they were not properly ending up in the Windows Recycle Bin.
  - Empty text files were not being uploaded to the server.

#### **Estimate Module**

- There is a new report, *Pricing Worksheet*, which is intended as a worksheet for generating a report that can be given to a customer.
  - It uses the *Customer Sell Price* (Material), *Customer Sell Rate* (Labor) and *Custom Marked Up Quote Amount* (Subcontracts) for itemized costs..
  - $\circ$  All other costs are shown the same as on the Estimate Summary.
  - There is no margin or markup shown on the report.
- On a System node, the Part list can be sorted by the *Has Accessory or Alternate* column.

#### **Design Module**

- When selecting the order of SmartStruxure modules, the *Power Balance* will now calculate properly when a secondary Power Supply is included in the list.
- The Sensor shape's pipe immersion symbol now has a solid white background to prevent ductwork shapes from showing through.
- There is an updated version of the MNB-1000 controller shape that includes a custom label for the 20V output.
- The Page Wizard now allows Page Names to be up to 100 characters long.

#### **Service Estimating Module**

• The *Proposal Cover Letter* documents have been updated to show the proper values in the third paragraph.

# **Release 3.4.431**

March 5, 2014

- In the Studio Options (TOOLS → OPTIONS), there is a new tab for Connectivity settings, and a new custom value for the Project Upload timeout. This timeout may need to be increased on slow network or VPN connections.
- If you select a project from the FILE→RECENT PROJECTS or FILE→FAVORITE PROJECTS menus, and there is currently no project open in Studio, the project will now be opened in the current instance of Studio. In previous versions a new instance of Studio was launched.
- The Multi-File Library feature has been enhanced.
  - You can assign a Version Number to a library, which is shown when you are browsing the libraries.
  - When managing the libraries, you can

- Multi-select files to remove files.
- Overwrite existing files by dragging in a new version with the same name.
- When browsing the libraries to Insert Files:
  - The filter settings will be remembered the next time your select INSERT FILE FROM MULTI-FILE LIBRARY.
  - You can mark a library as a favorite by right-clicking on the library and selecting MARK AS FAVORITE. To filter the library list to just the favorites, check the FAVORITES box
  - You can filter to just recently used libraries by checking the RECENT box.
- Each Multi-File Library is now assigned a unique identifier which is used to track changes in the libraries.
  - As a file inserted into a project from a library will bring with it the history of that file and library. This will allow for the tracking of library files used and how system drawings or software files were derived from copies of others.
  - You can view the history of a library by right-clicking on the library in the *Manage System Libraries* or *Insert Files from Multi-File Library* form and selecting VIEW LIBRARY HISTORY.
  - You can view the history of a file that came from a library by right-clicking it in the Files tab list and selecting VIEW LIBRARY FILE HISTORY.
- A number of issues with the Submittal Generator have been resolved, including
  - Designer and Estimate reports are now generated in the order specified.
  - All necessary drawings are scanned before running Design reports.
  - In title pages, field codes in the header and footers of will be found and replaced with values.
  - The sample Part Information PDFs title page has been updated to adjust the heading fields.
- There is a new Network Tree stencil for Security which includes shapes for Video devices, Camera equipment, and Card Readers.
- The Network Tree stencil for SmartStruxure now includes a shape for the PS-34V power supply.

- The SE Room Controllers stencil now includes a shape for the SER8300 series.
- Some improvements have been made to the Error Checks
  - When run from the DESIGN TOOLS menu of an open drawing, you will be prompted to save the file. This is recommended to ensure that your work is not lost if Visio encounters an error.
  - $\circ$  The zoom level is retained as you select different shapes from the Error List.
  - Other optimizations to speed and accuracy of the error report.

- The *SmartStruxure I/O Points* report and its layout have been enhanced to be more compatible when copying and pasting data into SmartStruxure WorkStation.
- The I/O Point shape in the *Sensors and Transmitters* stencil has been updated to allow the resistance amount label (e.g.  $.25k \Omega$ ) to be movable.
- The SE SCR shape in the *Combo Sensors* stencil has been updated to fix a problem with the custom power labels.

February 18, 2014

## **Service Estimating Module**

- You can now specify a list of Facilities for Multisite Service Plans.
  - On the Estimate's Overview tab, enter the name and address of the facilities.
  - The list will be generated within the Multisite Service Plan document.
- The equipment lists now generate as tables in the Service Plan and Work Scope documents.
- When Repair costs are included, you can now specify whether the Repair Material should be included or not.
  - On the Service Equipment tab of a System, Area or the Estimate, select *Yes*, *No* or *Default* for INCLUDE REPAIR MATERIAL.
  - If you select *Default*, the setting is carried down from the Area or Estimate above. Use *Yes* or *No* to override the default.
  - You can also specify the default for the Estimate on the Estimate's *Overview* tab.
- There is a new calculated value for Number of Visits (per year) that is associated with each piece of equipment.
  - It is shown on the equipment list on the *Service Equipment* tab.
  - It is also shown on the *Service Equipment List* reports and the equipment lists in the contract documents.

# Release 3.4.429

## February 11, 2014

- You can now import the list of devices from a Niagara Ax (aka G3) station backup onto the Network Tree.
  - Add an ENC-520 or ENC-410 from the Niagara stencil, or a JACE 503 (AX) or JACE 645 (AX) from the Tridium stencil.
  - Copy *the config.bog* file onto the device's FILES tab.

- Select the IMPORT DEVICES tab. If not already selected in the Import From list, select the *config.bog* file.
- Click Import Devices to find all BACnet, Lon, ASD and Modbus devices and add them to the appropriate buses of the device.
- There is a new option (TOOLS→OPTIONS→SERVER SETTINGS) that forces the user to explicitly log into Studio each time Studio is launched. This feature can be used to access files on a shared workstation.
- When creating a menu of New file templates in the *Custom Templates.xml* file, you can automatically have the file set as a Quality Record by adding:

<QualityRecord >True</QualityRecord>

#### **Estimate Module**

- For Service Estimates only, there was a calculation change.
  - For Labor Codes that specified a percentage of time off site, the Repair Hours were being used to calculate the number of trips needed, as shown on the Estimate's Expenses/Travel tab. However, these specific trip dollars were not being included in the rest of the calculations (as shown on the Summary tab or in reports).
  - When you open a project with a Service Estimate, you may receive a message showing the effective difference. You will need to accept this change to continue editing the estimate.
- There is a new Material List (By Manufacturer) report.
- When running reports, there is an option to filter the itemized data (part list, point list, labor list) to a specific subset of systems. This is designed for creating subset reports, and not to replace the Include/Exclude System feature of the Estimate. When using this feature, aggregate reports such as the *Estimate Summary* will likely be incorrect.
- When adding line item Labor hours on a System, there is a checkbox to SHOW UP/DOWN BUTTONS for each number to make it easier to change the hours for each task code.

- The Error Checking features have been completely revised and updated.
  - The utility will check the data from the shapes in the drawings (Part Numbers, BOM Tags, Point Information, etc.) and report on any inconsistencies or errors.
  - You can run the error checks on the entire Design project from the *Designer Tools* tab or TOOLS  $\rightarrow$  DESIGNER menu.
  - You can also run the error checks on a single Visio drawing file that you have open from the custom DESIGN TOOLS  $\rightarrow$  CHECK FOR ERRORS menu command (available from the ADD-INS menu in newer versions of Visio). This command completely replaces the older error checks.
  - When viewing the list of errors, you can right-click on each error and be taken to the affected shape (opening the file as needed).

- The error checks include: Duplicate BOM Tags, Duplicate Point Connections, bad and missing Point Connections, and Obsolete Part Numbers.
- Until now, all the points specified in a controller shape were automatically associated with the same *System* field as the controller. If the point was connected to a Sensor shape, and that Sensor's System was different, the point would not be matched and much of the information about the point (point type, engineering range, etc.) would not be available on the *Controller Checkout* reports. This behavior has been changed.
  - **NOTE**: Your may need to do a CLEAR PROJECT DB and then UPDATE PROJECT DB (from the DESIGNER TOOLS tab or menu) to force the drawings to be rescanned with the new rules and fields to see these changes in existing drawings.
  - Points are now matched solely on the BOM Tag of the controller and the Point Name. If there are two controller's with identical BOM Tags, the points will not necessarily match uniquely, so unique BOM Tags are strongly encouraged
  - If the Sensor is in a different System than the controller, the point will now be associated with the Sensor's System.
  - The I/O Point Shape now allows you to specify a System. If used, the point will be associated with this system.
  - When points are in a different system than the controllers, this will be reflected on the *Points* tab of the generated System Tree, as well as in several point-related reports.
  - You can now use the *<PointSystem>* field in a custom Controller Checkout report to indicate the specific system of each point.
  - Similarly, the *Location* property is now associated with each point.
    - The Location of a point is the same as the Controller, unless a distinct Location is specified in the Sensor or I/O Point shape.
    - You can use the new *<PointLocation>* field in a custom Controller Checkout report.
  - Use the new Error Checking feature described above to validate the points and check for any inconsistencies.
- There is a new option (TOOLS→OPTIONS→DESIGNER MODULE) for Sensor shapes that force their Part Properties form to open on the *I/O Point* tab (instead of *Part Properties* tab) if the Part Number has already been selected.
- When adding actuators to a drawing using the *Select an Actuator* shape, in many cases the *Show on Bill of Materials* checkbox was not set by default. This has been changed.

January 13, 2014

## **Core Module**

• You can run a report of all electronic signatures in a project. Select TOOLS→REPORTS→SIGNATURE REPORTS.

#### **Estimate Module**

- The Sales Tax calculation can now be configured in a number of different ways.
  - The Sales Tax Base is now adjustable, and the value is shown on the Estimate's Summary tab.
  - To configure the calculation of the Sales Tax Base, click the ESTIMATE SETTINGS button and go to the *Expenses and Allowances/Taxes and Freight* tab.
  - You can calculate the Sales Tax Base based on the Direct Cost, Total Cost or Contract Amount, and include any combination of Material, Labor, Subcontracts and/or Expenses.
- Calculated Travel Expenses can now be turned off and on. There is a checkbox for ENABLE TRAVEL CALCULATIONS at the top of the *Expenses/Travel* tab.
- When browsing the parts database to select parts to add to a System node's Parts List, there is a new button, VALVE AND ACTUATOR SELECTOR, which will bring up the Valve and Actuator Selection tool in a separate window from which you can filter for an add valve and actuator parts.

#### **Design Module**

- You can now create SmartStruxure I/O Module Door Labels using the data from your Design drawings.
  - On the *Reports* tab, click the SMARTSTRUXURE I/O DOOR LABELS button to generate the label report in Microsoft Word (which must be installed on the machine).
- There is a new Design report, *SmartStruxure IO Points*, that is designed to generate I/O module information in a format suitable for copying and pasting into the SmartStruxure WorkStation software.
- The Revision Notes tool has been updated to allow for all revision notes to be erased without adding a new one.

## **Release 3.4.427**

December 23, 2013

- For the Submittal Generator, there is a new default Title Page (*Generic Title Page.doc*) installed on the workstation.
  - It is stored in the [Application Data] Reports Title Pages folder. You can access [Application Data] from the TOOLS  $\rightarrow$  OPTIONS Local Files tab.
  - You can duplicate and edit this file to customize for your own use.
- The Submittal Generator's Part Information PDFs node now allows you to sort and group the PDFs in a variety of ways with sub-section title pages.

- You can choose to group by any combination of Manufacturer Name, Category or Installing Trade (for Design projects).
- For each Category and Trade you can also choose the specific order used for each group.
- You can choose to include a separate Title Page on one or more of the group levels.
- There is a new 'Part Information PDF' title page template you can select from the Properties tab, or copy and customize for your own use (refer to the Release Notes for 3.4.426).
- The fields *<ProjectName>* and *<ProjectNumber>* are available for all projects types for use in Reports, Submittal Title Pages and New File templates. They map to different properties of different project types:
  - Job and Design projects have both properties
  - Customer Site projects now have a *Project Number* property. The *Project Name* property is set to the *Name* property.
  - For Estimate projects, the *Project Name* and *Project Number* are set to the *Estimate Name* and *Quote Number* properties, respectively.
- You can now view thumbnail images of files stored in Studio.
  - Right-click in the empty area of a Files tab and select VIEW ICONS.
  - To return to a listing of files, right-click in the empty area of a Files tab and select VIEW DETAILS.
- You can now use CTRL+A (or EDIT→SELECT ALL or right-click SELECT ALL) to select all the files in a Files tab.
- There is a new feature that allows you to electronically "sign" a file for the purposes of tracking approvals of documents.
  - You can Sign any file that has been uploaded to a server project. Right-click on the file (or files) and select SIGN FILE. You will be prompted to add an optional comment to the signature.
  - When a file is signed, a small pencil icon will appear next to the file. The file will also be treated as if it has been locked. The file will be read-only when opened and attempts to upload changes will be rejected.
  - Signatures are not permanent. Any user can remove a signature and edit the file again. To unsign a file, right-click the file (or files) and select UNSIGN FILES. The history of the signing and unsigning, along with all comments, will remain.
  - To view the history of Signatures on a file, right-click the file and select SIGNATURES. A new tab will be shown next to the file's *Properties* and *Previous Versions*.
  - Multiple people can sign the same file.
  - You must be connected to the server to sign, unsign or view the signature history for a file.

- For the purposes of tracking, you can now flag a System node stored in a Multi-file Library such that when the System node is inserted into an existing Estimate, the system will be "locked" from edits until explicitly unlocked.
  - To flag the Systems .stexp file in the library, open the library (in the TOOLS→LIBRARIES→MANAGE SYSTEM LIBRARIES), select the file in the Files tab, and click FILE PROPERTIES. The new option is LOCK SYSTEM FROM EDITS WHEN INSERTING INTO A PROJECT.
  - Once added to the project, the locked system is read-only and will appear with a small lock icon. To unlock the system, right-click on it and select UNLOCK NODE. A note will automatically be added to the Comments tab.
- A file can be marked as a "Quality Record" (Schneider Electric Only).
  - Right-click on the file or files and select MARK AS QUALITY RECORD.
  - To umark the file, right-click and select UNMARK AS QUALITY RECORD.
  - In the Advanced Search options, you can filter on whether a file is a Quality Record or not.
- The Network Tree stencil for the Tridium devices includes new items for the Tridium JACE-603 and JACE-645, for both the R2 and Ax product lines. These are identical in functionality to the UNC/ENC 410 and 520 items.

#### **Estimate Module**

- As with files, you can also "sign" an Estimate (in its own project or as part of a Customer Site or Job project) for the purposes of tracking approvals.
  - To sign an Estimate, right-click on the Estimate node and select SIGN ESTIMATE. You will be prompted to add an optional comment to the signature.
  - When an Estimate is signed, it and all of its areas and systems are automatically locked and made read-only.
  - Once signed, a new tab called Signature will be shown on the Estimate with the history of the signatures with comments.
  - Anyone can remove a signature and edit the Estimate again. To unsign an Estimate, right-click the Estimate and select UNSIGN ESTIMATE. The history of the signing and unsigning, along with all comments, will remain and is shown.
  - Multiple people can sign the same Estimate.
  - To Sign or Unsign and Estimate, the project must not be checked out to someone other than you. It does not, however, need to be checked out by you to be signed.

## Design Module

• The Designer stencil for the Niagara UNC and ENC 410 and 520 now allow for the selection of the replacement Tridium JACE-603 and JACE-645 part numbers.

December 9, 2013

## Service Estimating Module

- A calculated "Level Description" is shown for each piece of equipment, based on the selected tasks.
  - An aggregate "Level Description" is also shown for the entire Estimate by aggregating the levels for the individual pieces of equipment.
  - There is a new version of the Service Equipment List report, *Service Equipment List for Customer*, that does not include costs or hours. Both versions also now include the Level description
- You can now cut, copy and paste equipment items on a System node's Service Equipment list tab.
- The introductory paragraph associated with a piece of equipment and displayed on its Task Sheet is now editable in the Parts Database and on the System's Equipment List.
- When generating a Service Contract as a PDF, you can now choose to include the Equipment List and Task Sheets within the PDF as well.

- The system will now keep all previous versions of a project each time it is checked in. It also adds additional validation during check in to ensure the file is not corrupted.
- You can now view a list of the check-in history of a server project, and view any Previous Versions of a local or server Project.
  - Right-click on the project in the Local or Server Project List and select VIEW PREVIOUS PROJECT VERSIONS.
  - Studio will create a list of all available versions of a project, both locally and (for server projects) on the server.
  - You can view any of them in a temporary, read-only instance of Studio. You will not be able to make any edits, or view any files, emails, tasks, permissions or passwords.
  - You can set one of the previous versions to be the current version. You must have proper permission, and the project needs to be checked in at the time
  - If the project is an Estimate, or contains one or more Estimates, you can select two or more versions and compare the values in the Estimates in each version by clicking the COMPARE ESTIMATES button.

- The system will now log every file downloaded by a user.
  - You can view the download history for one or more files by selecting them in the Files tab, right-clicking and selecting ADMIN→VIEW DOWNLOAD HISTORY. You can filter by User, Computer Name, Download Date and File Name.
  - You can view the download history for a single user across multiple projects by selecting ADMIN→SERVER CONFIGURATION AND TOOLS, selecting the FILES AND PROJECTS tab, and clicking the FILE DOWNLOAD HISTORY button.
- The Submittal Generator can now create custom Document and Section Title pages, with or without a Table of Contents.
  - The title pages are created from a template Microsoft Word document
  - You can select the template for a document or section from the node's Properties tab. The list of available files comes from:
    - Templates stored on a workstation:
      - [Application Data]\Reports\Title Pages folder
    - Documents stored on the Files tab of any Submittal Document node
  - Templates can be distributed to all users in a Company by copying them to:

<Server Folder>/Resources/Reports/Title Pages

- You can include mail-merge style place holders for project properties to be filled in on each Title Page
  - Project Properties of the project containing the Submittal Node (e.g. <ProjectName>, <CustomerName>, <ProjectNumber>
  - A 'path' for the document and section names: <SectionPath>
  - A table of contents:<TOC>
- The Table of Contents will use the built-in Word styles ("TOC 1", "TOC 2", "TOC 3", etc.) when creating the table.
- For any node in the Submittal, you can specify that the documents be padded to an even number of pages to support two-sided printing better.
- A number of enhancements have been made to the custom items you can add to the NEW menu that appears when you right-click on a folder in a tree or in the blank area of a folder's FILES tab (see the Notes for *Release 3.1.358*).
  - In addition to the *Custom Templates.xml* file, entries can also be stored in a new file called *Enterprise Custom Templates.xml*. The format for the two files are the same, and the entries are merged together into a single menu.
  - There are new properties that can be added to the entries for each template file:
    - *MenuPath* can be used to create one or more levels of sub-menus to organize the documents.

<MenuPath>Cover Letters/Bidding</MenuPath>

• *SeparatorBefore* indicates that there should be a separator line in the menu before the entry

<SeparatorBefore>True</SeparatorBefore>

• *OnlyAllowOnNodeTypes* specifies a list of node types that should show this template file (and therefore not show it on all others). If this tag is omitted, the template is available for all node types.

<OnlyAllowOnNodeTypes>Folder, System</OnlyAllowOnNodeTypes>

- OnlyAllowOnNodesNamed specifies a name or file pattern for the nodes that should show this template (and therefore not show it on all others).. <OnlyAllowOnNodesNamed>Sales\*</OnlyAllowOnNodesNamed>
- *ProcessTemplate* indicates that the template should be scanned for mailmerge style property field tags and replace them with the current values when the template file is added to a project from the NEW menu.

<ProcessTemplate>True</ProcessTemplate>

- Properties should be defined in the form *<PropertyName>*, as in "*<*ProjectName>" or "*<*ProjectNumber>".
- Only Word and Excel files are scanned and their values replaced.
- In Excel files, tags are only found if they are the only value in a cell.

#### **Estimate Module**

- You can compare the values from two or more versions of an Estimate project (or each of the Estimates in a Site or Job project)
  - In the Open Project dialog, right-click on the project and select VIEW PREVIOUS PROJECT VERSIONS
  - Select the checkboxes for two or more version to compare.
  - Click the COMPARE ESTIMATES button.
- There is a new Summary tab on the System node that shows an overview of the costs and values for the system.
- A user can now specify a list of "My Top Parts" to easily find their most frequently used parts.
  - Right-click on a part in Parts Database tab and select ADD TO MY TOP PARTS
  - $\circ~$  Custom top parts are shown on the new My TOP PARTS tab when adding parts to a system.

#### **Design Module**

• There is a new SE Room Controller shape for the new SER8300 series of Room Controllers.

## **Release 3.4.425**

November 22, 2013

#### **Service Estimating Module**

• Beta Version 2

## **Release 3.4.424**

November 12, 2013

## **Service Estimating Module**

• Beta Version 1

## **Release 3.4.423**

November 3, 2013

## Service Estimating Module

• Additional alpha features available.

## **Release 3.4.422**

October 22, 2013

## Service Estimating Module

• Alpha features available.

# **Release 3.4.421**

October 14, 2013

## **Core Module**

• Numerous bug fixes.

## **Design Module**

• In the JACE 200 and 600 shapes, there was an issue with the Lan1 and Lan2 labels being shown improperly. This has been resolved.

October 1, 2013

## **Core Module**

- When connected to your server with a high-speed connection, you can choose to have the list of Files on any Files tab stay updated at all times.
  - In Tools→Options, on the Workstation tab, check the Auto Synch files on Files Tab checkbox to have Studio automatically refresh the list every time you select a new folder or object in the Project or Network tree.
  - You can also specify how often Studio will refresh the list by changing the *Autorefresh Files Tab every X seconds* value.
- When comments are added to the Comments tab of an Estimate node or Network Tree device, an icon will appear next to the tab name.
- When Studio export files (such as Estimate Systems) are added to a Multi-File Library, you will be given the option to remove pricing information from any parts in the export.

## **Estimate Module**

- You can now specify subcontracts as part of a System or Area:
  - There is a new *Subcontracts* tab on these nodes. You can add subcontracts and associate them with a Labor Code and Vendor Name.
  - When viewing an Area, it will aggregate the subcontracts from the child Systems based on matching both the Labor Code and Vendor Name. You can then add additional Area-specific costs to the subcontract.
  - The subcontracts from the Areas and Systems will be shown on the Estimate's subcontract tab. There you can choose to include them and to specify custom markups.
  - This feature is intended for cases where you want to be able to include or exclude a System or Area to create alternate estimates.
- On a System's *Parts* tab, when the *Typical Of* value is greater than one, the total cost for all the systems is broken down to show the sums of typical and non-typical parts.
- On a System's *Points* tab, when the *Typical Of* values is greater than one and a point is marked as 'Not Typical', you can now specify a *Quantity* value for that point. Previously the quantity was assumed to be one.
- On the Estimate's *PM Hours Worksheet* (on the *Labor* tab), you can now specify multiple phases for the jobs in order to more specifically calculate the Project Management hours for regular weekly and monthly meetings in each phase.

#### **Parts Database**

- The Part Packages feature has been expanded:
  - $\circ$  They are stored as individual files with a .stpkg extension.

- They are distributed to company users with regular updates, and do not require the Parts Database Manager to publish the parts database to update the packages.
- They can be organized into folders.
- They can be created by and shared between individual users for their own use.
- The Company packages, which are distributed to all users automatically, are stored in the server folder in the *Resources*/*Parts Packages*/*Company* folder.
  - You can copy and paste individual files into this folder freely.
  - You can create sub-folders to organize packages. Users will see the folder structure when browsing for packages.
  - All the package files and folders are copied to the user's machine during updates.
- Packages are stored on each workstation in the [Application Data]\Part Packages folder.
  - There are separate sub-folders for User and Company.
  - User created packages are stored in the User folder and are only available on that workstation.
  - The Company folder is a copy of the *Resources\Parts Packages\Company* folder from the server. Any files added to the user's version of the Company folder will be overwritten or removed.
- The next time a Parts Database Manager starts the Parts Database Manager (ADMIN→PARTS DATABASE), the existing packages in the database will be migrated into individual files in the Company folder.
  - After the Parts Database is next published, the users will see the changes.
- The Company packages can still be edited from the Parts Database Manager by selecting DATA TABLES→PART PACKAGES.
  - The Company folder will show the company packages
  - The User folder will show the Parts Database Manager's personal packages (in case they want to copy in ones they've created themselves).
  - Right-click on a folder to:
    - Create a new package
    - Create a new folder
    - Open the folder in Windows Explorer to manipulate the files and folders manually (click the REFRESH LIST button afterwards to update the package list).
  - Right-click on a package to:
    - Edit the Package
    - Duplicate the Package
    - Delete or Rename the Package

- The end users will see:
  - The Package selector in an Estimate's System node will reflect the new packages, and separate the User's packages from the Company's packages.
  - The user can edit their own packages by going to TOOLS  $\rightarrow$  PARTS  $\rightarrow$  MANAGE MY PACKAGES.
  - The features for Manage My Packages are similar to the ones for managing the company packages in the Parts Database Manager, though the user can only see and duplicate company packages in that view.
- You can also do a Find and Replace on various properties (such as price) of the Parts in one or more packages.
  - When managing company or user packages, right-click on a package or folder and select FIND AND REPLACE PARTS.

September 19, 2013

## **Core Module**

- You can now quickly access recently opened projects.
  - There is a new menu item, FILE→RECENT PROJECTS, that shows a list of the most recent projects you opened, including local, server and remote projects. Selecting the project name opens it in a separate instance of Studio.
  - You can specify the number of projects on the menu from the TOOLS $\rightarrow$ OPTIONS form on the Workstation tab.
- You can also create your own list of favorite projects that can be accessed from the new FILE→FAVORITE PROJECTS menu.
  - There is a new menu item, FILE→RECENT PROJECTS, that shows a list of the most recent projects you opened, including local, server and remote projects. Selecting the project name opens it in a separate instance of Studio.
- The *Back* and *Forward* buttons on the toolbar are now available to navigate back to previously selected nodes and tabs.

## **Estimate Module**

- You can now do a Find and Replace on the Parts lists of a System, Area or the entire Estimate.
  - Right click on the node and select TOOLS  $\rightarrow$  FIND AND REPLACE PARTS to bring up the Find and Replace form.
  - Select the Part Number you wish to find.
  - Select any or all of the fields you wish to update, including *Part Number*, *Description*, *List Price and/or Labor Hours*.

- The *Allowance for Risk*, previously only available as a single percentage of the Estimate's cost on the Estimate/Allowances tab, can now be specified on individual Systems and Areas.
  - There is a new tab, *Other Costs*, where the Risk values can be entered.
  - The calculation for each System or Area is based on only the costs for that System or Area.
  - The individual Risk dollars are aggregated up and shown at each level, including for the Estimate.

September 10, 2013

## **Core Module**

- The new properties of the project nodes (Site, Job, Designer and Estimate) introduced in 3.4.413 have been updated.
- Jobs now contain a similar set of properties on the Project tab that the Designer projects do, allowing embedded Designer projects to inherit the values from the Job.
- There are additional properties and Network Tree shapes in the PC Network stencil for modeling an organization's servers, routers, workstations, VM servers and machines, web sites and domains. These nodes work well in conjunction with the Passwords tab for storing critical IT information.
- The Multi-File Library has been updated with additional properties for Unit Ventilators and Fan Coil Units.
- After you clean the local files from the server project list it will no longer resort the list.

## **Design Module**

- There is a new shape for the TSMN-90xxx Series sensors in the Designer Combo Sensors stencil.
- There was an issue relating to Smart Charts and Controller Checkout sheets missing the point information. This has been resolved. If you are experiencing this issue, please do the following two things to update the project:
  - Open the Visio drawing file, right-click on the heading of the Smart Chart and select EDIT MASTER DEVICE PROPERTIES. Then click OK.
  - From the Designer node's Designer Tools tab, click CLEAR PROJECT DATABASE and then UPDATE PROJECT DATABASE.
- There is a new report, *SE All Recommended Alternates*, that shows all the parts that have higher-rated Schneider Electric alternates.

## **Estimating Module**

- The *Estimate Report Field List* report now shows all the available Project Properties that can be filled in on the Estimate's *Properties* tab.
- There is a new report, *SE All Recommended Alternates*, that shows all the parts that have higher-rated Schneider Electric alternates.

August 22, 2013

- Studio will now check the connectivity to the network file and SQL servers on a regular basis, allowing disconnected sessions to be reconnected.
  - If disconnected, a yellow warning icon will appear in the lower left corner of the status bar. Clicking this icon will bring up the new Connectivity Manager form to allow you to test connections and review error messages.
  - You can also access the Connectivity Manager from the TOOLS $\rightarrow$ OPTIONS dialog on the Workstation tab.
- The root project nodes (Site, Job, Estimate and Designer) now all have the same set of project-related properties, in categories such as *Site*, *Building*, *Office*, *Customer*, *Contacts*, *Subcontractors* and *Contractors*. These fields can be used to store names, addresses and contact information.
  - You can access these values from new sub-tabs on the Properties.
  - When a Job, Estimate or Designer projects is embedded in another project, such as a Site project, the values will be *inherited* (copied) from the parent project. You can override these values on a one-by-one basis.
  - These values can be added to Estimate and Designer report headers, in a form such as <SiteName>.
  - When you hover over a server project in the Open Project List, over hover over a shortcut to a project embedded in another project, you will see a pop-up of the key property values, if specified.
- The Job Number and/or Quote Number will now appear in the title bar of Studio, after the Project Name, when a project is open.
  - In cases where you have multiple projects open in multiple instances of Studio, you may prefer to have the number appear before the Project Name. This option is available in TOOLS→OPTIONS on the Workstation tab.
- The Continuum DMP file import feature now supports more device part numbers. There is a Network Tree stencil shape for the older Network Controller device.

- The Enterprise-level Statistics Report has been updated to include:
  - For Estimates, the Contract Amount and Gross Margin (as percent and dollars).
  - For Designer nodes, the number of Designer Visio drawing files and the child node count.
  - If you have previously scanned nodes, you will want to click the CLEAR LAST SCAN DATE button before doing the next scan of nodes to get the new information.

#### **Design Module**

- The Table of Contents can now show the Page Names instead of the System Names.
- The reports include a data field <NetCost> which represents the true net cost for a part for the user, regardless of if they are a partner or SE branch. The SE specific reports have been updated as well.
- The EH Series sensor in the Combo Sensors stencil has been updated to make the power supply optional.

## **Estimating Module**

• When you run a report, you will now be notified if any of the parts' pricing differs from the Parts Database. If so, you will be offered to go to the Material/Update Parts to Database tab to review and update.

# **Release 3.4.412**

July 30, 2013

- The Niagara R2 import utility will now import LCM and GCM Serial devices onto the Network Tree.
- Numerous bug fixes and minor improvements

July 16, 2013

## **Core Module**

- There are new Network Tree devices the Schneider Electric *SmartStruxure Lite* (formerly *Can2Go*) product line.
- There is a new feature called File Locking, which allows a user to put an exclusive lock on one or more files.
  - To lock a file, simply right-click it and select LOCK FILE. To unlock the file, right-click it and select Unlock File.
  - When locked by a user, the file will have a check mark icon next to it. When locked by someone else, the file will have a padlock icon. Right-click on the file and select PROPERTIES to see who has the lock and on what workstation.
  - When a file is locked to a person and a specific workstation, only that person can upload new versions of the file. All other users will have the file marked as read-only the next time they open it while connected to the network.
  - If someone else has already begun editing a file is locked by another person, the first person's changes are not lost. However, they will not be able to upload their changes until the file is unlocked. If the second person uploads a new version in that time, the first person's changes will trigger a file conflict to be resolved.
  - An user with the Account or IT Administrator right has the ability to unlock any file regardless of who has locked it. When they right-click on a locked file, a menu item "Unlock (Admin)" will be available.
  - This feature is unrelated to checking out a project.
- You can now map the Studio Clipboard Folder to a drive letter for easier access outside of Studio. Go to TOOLS->OPTIONS on the WORKSTATION OPTIONS tab.
- When you drag and drop files around Studio, the icon will properly reflect that the files will be moved and not copied. To force the drop to create a copy of the files, hold the CTRL key when dropping.
- Some of the options available for the Updater when it runs and completes have been updated.

## **Design Module**

• There is a new stencil of shapes for the Schneider Electric *SmartStruxure Lite* (formerly *Can2Go*) product line.

## **Estimating Module**

• When a System or Area is added to an Estimate from a Multi-File Library, the List Price and Discount Multiplier will automatically be updated to the values in the user's Parts Database.

June 25, 2013

## **Core Module**

- To greatly improve the startup time of the application, many of the checks for various updates (license updates, new versions of the program, new Parts Database, new PDFs and new custom reports and libraries distributed from your company server) have been removed from the launch of Studio and moved to a separate Background Updater.
  - The Background Updater is launched once a day and will display as an icon in the system tray (right side of the standard Windows Task Bar). You can click on that icon to open the updater and view the status of the updates.
- You can now create a *Studio Shortcut* to a project, folder, file or remote server. A Studio Shortcut is a small file, similar to a Windows shortcut, that when opened or double-clicked will start Studio and automatically open up the associated project, folder, file or server.
  - The Studio Shortcut file has as *.stcmd* file extension. This file can be saved and opened from anywhere on your network, inside Studio itself, or as an email attachment.
  - To create a Studio Shortcut:
    - To create a shortcut to a project, right-click on the project in the Open Project dialog and select CREATE STUDIO SHORTCUT.
    - To create a shortcut to a folder in a project, right-click on the folder in the Project or Network Tree and select CREATE STUDIO SHORTCUT.
    - To create shortcut to a file, right-click on the file in the Files list on a Files tab and select CREATE STUDIO SHORTCUT.
    - To create a shortcut to a remote server, select File→Remote Login, select the server and click CREATE SHORTCUT FOR ACCOUNT.
- The Clipboard feature introduced in 3.4.406 has been extended
  - The Clipboard folder automatically contains a Windows shortcut to itself. You can copy and paste this file into various location in Windows to create the shortcut to the Clipboard folder
  - The Clipboard folder is automatically added to your My Documents folder as Smartware Studio Clipboard (or Studio360 Clipboard) when you open the clipboard for the first time through the toolbar or VIEW→CLIPBOARD menu command.

## **Estimating Module**

• An issue that occurred when running reports from an Estimate that had an apostrophe, double quote or semicolon in its name has been resolved.

June 12, 2013

## **Core Module**

- There is now a pre-defined folder called *Clipboard* that can be used to transfer files from other applications into Studio. This folder is permanent and available even when Studio is not running.
  - You can open the folder in Windows Explorer by selecting VIEW $\rightarrow$ CLIPBOARD or clicking the new CLIPBOARD icon in the toolbar.
  - In Windows 7 or later you can make this a Favorite location. Open the folder from Studio, then right-click on the Favorites icon in the upper-left corner and select ADD CURRENT LOCATION TO FAVORITES.

## Parts Database

- There is a new feature to support the Grouping of Estimate parts
  - There are three new User-defined Group fields (*UserGroup1*, *UserGroup2* and *UserGroup3*) available in the Parts table.
    - You can specify them explicitly with each part you add or edit
    - You can specify values for these fields on all parts, including those maintained by Smartware.
    - You can import these values using the Parts Database Manager's *Import New Parts* or *Update Existing Parts* tools.
    - There are no pre-defined values for the Smartware parts.
  - When selecting a value for these fields in the Parts Database Manager or a part item in a System in an Estimate, the user will be presented with a list of all the values for the existing parts in the database, but can enter custom values.
  - To pre-define values for these fields, in the Parts Database Manager go to DATA TABLES  $\rightarrow$  PART GROUPINGS.
- Schneider Electric has rated each of the parts and added information about recommended accessories and alternates. This data is viewable from most places where you can select parts. To enable the color-coded SE Rating column, go to TOOLS→OPTIONS and select the *Parts Database* tab. Schneider Branch offices automatically have this option enabled.

#### **Design Module**

• There are new shapes in the SE Room Controller stencil to correspond to the additional models now available in the Parts Database.

#### **Estimating Module**

- The Parts tab for Systems has an additional Grouping field, which allows you to pick from a custom list of values in order to group the parts in an estimate together for custom reporting needs. For example, you may group the parts as "Domestic", "Foreign-Made" or "Built In-House" so that you may generate totals of the values of the material in each of these groups on a custom Booking Sheet report.
  - $\circ$  You can specify by hand for each part as you add them to the System.
  - If you populate one of the *UserGroup* fields in the Parts Database (see section above), you can have the Grouping value automatically filled in as the Estimator selects parts from the database. In the Estimate Settings form, select the *Other* tab and pick which of the three *UserGroup* fields to use.
  - There is a new report, *Material List (By Grouping)* to show the material grouped by this field.
  - The *Estimate Report Field List* report has been updated to show how to extract the totals for a specific group into a custom report.
- When adding a Line Item or editing a part in the System list, you can now specify the *Manufacturer* and the *Grouping* fields.
- The *Material List (By System)* and *Material List Sell Price (By System)* reports were not properly aggregating like parts together into a single line on the report. This has been fixed.

# **Release 3.4.405**

June 4, 2013

## **Core Module**

• In the Browse Parts tool, the Part Number column is now frozen when you scroll horizontally to see other columns.

- The Design module will no longer automatically download all Drawing files for a project when you open a single drawing file (or use other tools, such as the Page Wizard or Print Manager), as long as the project scan is up to date. In these cases the drawing files will only be downloaded from the server if they have been changed or are new.
- The Table of Contents tool will now remember the formatting settings (Number of Columns and the Page/System/Page Number format string).
- The MNL-800 shape in the SE I/A Lon stencil had an error in showing the shield wire connected to the Shield terminal instead of the COM terminal (as is recommended). Existing instances of the shape will upgrade automatically when it is double-clicked.

#### **Estimate Module**

- You can now choose to suppress the labor hours calculated for any system or area based on its Material and Points. The Labor tab on the System and Area nodes now has two checkboxes, *Suppress Calculated Material Labor* and *Suppress Calculated Point Labor*, which apply to that system or the entire area.
- In the Parts list, the Part Number column is now frozen when you scroll horizontally to see other columns.
- When you add a package to a system, it will no longer retrieve the labor factors for each part from the database (which was overwriting any specific changes made within the package).

## **Release 3.4.401**

May 15, 2013

• The software now runs on and requires *the Microsoft*.*NET Framework 4.0 Full Version* (not the Client Profile). This is available for download on our web site, as well as Microsoft's, though the installer should offer to download it for you when you try to install the update.

- You can now copy and paste Outlook attachments to the email tab of any folder (previously only drag and drop was allowed).
- When the program shuts down, any temporary drive letter mappings will be removed.
- The Parts Database now loads in the background after the program starts, which should greatly reduce the appearance of the "Loading Parts Database… Please wait" message.
- When you move (cut and paste or drag and drop) a sever file that has a previous version history, that history will move with the file.
- There is a new property associated with all files, *Document State*, which allows you to choose from a pre-defined list (Draft, Approved, As-Built, etc.) or add your own custom values.
  - To set the Document State, right-click on a file and select Properties.
  - To show the Document State on the Files list, select VIEW→FILE DOCUMENT STATE
  - You can search for files based on Document State in the Files list's *Advanced Search* and the *Search Files* feature in ADMIN→SERVER CONFIGURATION AND TOOLS on the *Files and Projects* tab.
- There is a new Server File Update Utility designed for the specific task of adding, updating or deleting the same file from multiple same-named folders in all the projects on a server. To run the utility and for further detail, go to ADMIN→SERVER CONFIGURATION AND TOOLS on the *Files and Projects* tab.

• There is a new option on the TOOLS→OPTIONS/WORKSTATION tab that allows you to specify a proxy server for getting to the internet. This setting should only be necessary if you are unable to reach the Smartware license server, download PDF files to your server, synch to the Smartware master Parts Database or otherwise connect to the internet from Studio.

- The Page Wizard has been enhanced:
  - You can renumber the pages based on the viewed sorting order (to sort by file name or system name)
  - You can multi-select pages and renumber that group separately.
  - When you renumber pages you can add a section prefix and/or zero-pad page numbers (e.g. "VALVES-001")
  - You can specify an order for the section prefixes
- In conjunction with the section name prefixes specified in the Page Wizard:
  - The Print Manager has been updated to use the section prefix order for printing pages and for page range selection
  - The Title Block shape has been updated to adjust the "Page 1 of 50" format to an alpha-numeric format when appropriate or selected
  - The Table of Contents editor will order the pages using the section prefix order
- The Table of Contents can now span multiple pages.
  - You can specify a Page Break Before on any item in the page listing to start a new page.
  - If your Table of Contents drawing file has multiple pages, they will be used as formatted, with the only the Project Properties and the actual Table of Contents updated. If not, the first page will be copied for each subsequent page.
  - You can also add a second page to your custom Table of Contents template file. If specified, this second page will be copied in and used for all secondary pages.
- There is a new Visio stencil, *Websensors*, which contains shapes for a line of Web Based temperature and humidity and power monitoring devices.
- The *Controller Checkout 2* report now show information about resistors, jumpers and dip switch settings per point in a new Point Setup column. You will need to update the project database (Clear Project DB and UPDATE PROJECT DB from the Designer Tools tab) to see these changes.
- A few instances where International date formats were not being respected in the Page Wizard, Revision Notes and Title Block shape have been resolved.

#### **Estimate Module**

- We have found a relatively rare case where the Estimate module may miscalculate the labor cost for a system.
  - It can occur with System that has a *Typical O*f value greater than one that has the same part number appear twice on two separate line items, one of which has *Not Typical* checked and other without it checked.
  - When you open an Estimate, this issue will be detected and you will be given explicit instructions on how to see how the effect of correcting the calculation affects your existing estimate before accepting the update.
  - There is also a new *Verify Estimate Calculations* utility (go to ADMIN→SERVER CONFIGURATION AND TOOLS on the *Files and Projects* tab) that will scan all the estimates in all the server projects and report on any cases and their impact on the costs.
  - If you have any questions, please contact our support team.

## Release 3.3.395

March 24, 2013

• The Compare Systems feature introduced in 3.3.382 (a report that compares the systems in an Estimate project with those in a Design Project (or two Design or Estimate projects, if you wish)), has been enhanced. You can now create a single-tab summary report comparing material in addition to the existing multi-tab report.

#### **Core Module**

- The *Files* tab of all nodes in the Project and Network Tree now has a SEARCH box, with lets you filter the list by one or more keywords (the file name and description is searched, but not the file contents). There is also an ADVANCED Search dialog to search by the last modification date, the file size and the file type. To search an entire Project Tree, select the root node and click the ALSO SHOW FILES FROM CHILD ITEMS.
- You can also search all the files in all the projects on your server. From the ADMIN->SERVER CONFIGURATION AND TOOLS dialog, select the *Files and Projects* tab and click the SEARCH FILES button.
- You can add a new column to the *Files* tab to view the current Version Number of server files by selecting VIEW→FILE VERSION NUMBER.

#### **Design Module**

• There are new Designer shapes for the Tridium R2 and Ax (G3) controllers, specifically the ENC-410, ENC-520, UNC-410 and UNC-520. They can be found in the *Tridium* Visio stencil. The older *I/A Niagara Devices* stencil has been moved into the Previous Versions folder and the older versions of the shapes deleted (they were corrupted and did not function properly with current versions of Visio).

- For Schneider Electric users, there is a new report (*SE Project Calculator*) that generates an export for use with the Project Calculator web site. There is also a link on the *Reports* tab with instructions on how to use it and a link to the site.
- The various Project Properties available on the Designer root node (Project, Site, Building, Customer, etc.) are now available for use in custom reports. There is a new report, *Design Report Field List*, which list these fields and explains how to use them.

#### **Estimating Module**

- For the various Tax Rates that can be specified on the Estimate's *Expenses/Taxes and Freight* tab, you can now create a list of pre-defined tax rates by names to make it easier to select.
  - The Tax Rates must be created and maintained only by your Company. Until you add one, there are no rates in the database.
  - You can add and edit the rates from the Parts Database Manager. Launch the Parts Database Manager (ADMIN $\rightarrow$ PARTS DATABASE), then select DATA TABLES $\rightarrow$ TAX RATES.
  - O You will need to publish the Parts Database from the Parts Database Manager Dashboard (FILE→DASHBOARD) to see the changes in the tax rates reflected on the Estimate's *Taxes and Freight* tab.
  - If a tax rate used in an Estimate is updated in the Parts Database and then the Estimate is subsequently opened, the tax rate will <u>not</u> change automatically. You will, however, receive a warning that it has changed so you review and change it manually if you wish.
- For Schneider Electric users, there is a new report (*SE Project Calculator*) that generates an export for use with the Project Calculator web site. There is also a link on the *Reports* tab with instructions on how to use it and a link to the site.
- There are two additional report fields in the *MaterialByVendor* table: *TotalListPrice* and *TotalKelListPrice*, which represent the total of the List Prices (extended by Quantity and the system's Typical Of) and the total List Prices for all parts beginning with "KEL-" for each Vendor.

## **Release 3.3.394**

March 18, 2013

#### **Core Module**

- This version introduces a new feature for creating a Submittal Document
  - The Submittal document can create a merged PDF file from any or all of the following:
    - Designer drawing pages
    - Product Information PDFs (Cutsheets) from Designer and/or Estimate projects
    - Reports from Designer or Estimate projects
    - Any other Word, Excel or PDF document
  - To create a Submittal Document, add a Submittal Document node (from the *Submittal* toolbox) to your project. You can then add Submittal Sections and any of the four types of Submittal Page sets to the Submittal.
  - To generate a single PDF from a page set, a section or the whole document, rightclick on the node and select TOOLS $\rightarrow$ GENERATE PDF.

# Release 3.3.393

February 28, 2013

## **Core Module**

- There are new network tree devices for Modbus devices and BACnet repeaters.
- There is a new Enterprise Level report for Point Statistics.
- The Task Checklist Statistics report's percentage completion was often incorrect. This has been resolved.

## **Design Module**

- The Designer Module is now compatible with Visio 2013 and Excel 2013.
- The Pt-to-Pt and Separable Relay shapes have been updated to resolve an issue with displaying improper terminal text.
- The STR100 and STR200 shapes in the Combo Sensors stencil have been updated.
- There are some additional properties in the Multi-File Libraries.

## **Estimating Module**

- The Comments tab now has a vertical scroll bar.
- The Subcontract list on the Estimate Node is now bigger.

February 11, 2013

## **Design Module**

- Fixed a number of issues with the Sensor and I/O Point shapes.
- Corrected point names on JACE I/O 16 Module.
- Updated report templates to properly handle numeric part number with leading zeros (Xenta parts)

## **Core Module**

• Updated Task Checklist form to show "Process Exception" tasks as checked, and to make check boxes not automatically change task status unless explicitly enabled with a new checkbox on the form.

## Release 3.3.391

January 22, 2013

- Where the Parts Database indicates available accessories for a part, these accessories will now be listed specifically in a separate table on the Accessories tab for easy selection.
- The Bill of Material shape will now adjust its column widths to handle large Part Numbers.
- The Horizontal I/O Point shape will now maintain the font sizes of its text elements more consistently, expanding as needed instead of shrinking the text.
- In the I/O Point and Sensor shapes, custom values for Common, Power and Signal were not being reloaded when the shape was edited. This has been resolved.
- An issue relating to the length of file names when creating reports when logged into a remote server has been fixed.
- In the SE I/Net stencil, the MR88, MR88R and MR632 shapes have been updated. The Ground and +V terminals were switched on the drawing. These shapes will update automatically if you double-click them in the drawing.
- The point list for the SE Room Controllers (SE7xxx) has been updated. The System Point List and Controller Checkout reports will now be correct. For the 7200 and 7300 shapes, the BO5 point was handled incorrectly. This has been corrected and the shapes will update automatically if you double-click them in the drawing.
- The UIs and outputs on the Xenta 102-AX have been renamed appropriately.

#### **Estimating Module**

• An issue relating to the size of file names when creating reports when logged into a remote server has been fixed.

#### **Core Module**

- In the Open Project form, you can now choose to list projects from multiple Project Groups by checking the box next to the group names. You can optionally select projects that are in *Any* of the groups or those that are in *All* of the groups.
- The "Cc" and "Bcc" lists now show when viewing an email stored on the Emails tab of a folder.

#### **Parts Database**

- The Cv rating on 16 Valve Bodies (VBB2xx5 and VBx2xx6) has been corrected.
- Where Accessories or recommended Alternate Parts are known, they will be listed and selectable wherever part selection is possible, generally from the context menu.

## **Release 3.3.388**

December 9, 2012

- The *SE Struxureware* stencil contains a shape for the new AS (Automation Server). All the AS shapes also allow the showing of a connection to ground.
- There is a new *Combo Sensors* stencil (in the DESIGNER→HVAC stencil menu) that contains new shapes for Veris (TO/TDD, TW and CW series) and Schneider (AFS, EH, ETR, STR and TTS series) combination sensors. These shapes allow for multiple I/O points to be specified in the single shape.
- There is a new *Tridium* stencil that contains shapes for the JACE 200, 600, and 700 and their power supplies and I/O modules.
- There is a new *Transformer* shape in the *Power Supplies* stencil. There are new filter properties and the parts list has been updated for accuracy.
- The *MNL-800* shape in *the SE IA LON* stencil now supports the MNL-800-102 part number.
- The *SE Room Controller*, *xPDO2* and *Xenta-102AX* shapes have been updated to resolve some known issues.
- An issue with the xPDO2 shape has bee
- The *System Point List* report has been updated to support additional point types and show additional fields.
- New reports *Material Order List* and *Point Statistics* have been added.

#### **Estimating Module**

- The Points tab now allows for additional types of points, such as Smart Sensor, S-Link Sensor, Floating Outputs and Supervised Inputs. The *Point Count* reports have also been updated.
- A new *Point Statistics* report has been added.

## **Release 3.3.384**

November 6, 2012

#### **Parts Database**

- All parts manufactured and/or sold by Schneider Electric now reference a single Company UID (3244) and show a consistent Manufacturer or Vendor Name ("Schneider Electric").
- You can update an existing Estimate project by going to the *Material* tab and going to the *Update Parts to Database* tab.
  - Updating these values can change the estimate's cost calculation. Previously the Schneider Electric parts may have been grouped into two or three vendor rows, so could have had distinct Cost Escalation Factors. If you specified them, you will want to review your Cost Escalations after doing this update to an Estimate.
- You can update the Manufacturer or Vendor fields in a Designer project by refreshing the Project Database:
  - Select the root Designer node in the Project View and go to the *Designer Tools* tab.
  - Near the bottom, click the CLEAR PROJECT DB button, then the UPDATE PROJECT DB button. This will cause all the drawings files in the project to be rescanned.
  - If the System Tree is not fully updated, you can delete the System Tree then click the UPDATE SYSTEM TREE button.
- The labor factors for the Connect Air wire have been made consistent at 20 Electrical hours per 1000 foot box of wire.

- There are new menu commands for files and folders that allow you to do some common tasks directly from Studio.
- When you right-click on a file or multiple files, the menu now includes the following:
  - SEND TO  $\rightarrow$  ZIP FILE: creates a new zip file containing the selected files. The new zip file will be saved in the same folder as the files
  - SEND TO  $\rightarrow$  PRINTER: sends the selected files to the default printer.
  - SEND TO  $\rightarrow$  MAIL RECIPIENT: opens up a New Message window from your default mail client (e.g. Outlook) and attaches the selected files.

- SEND TO  $\rightarrow$  WINDOWS FOLDER: Lets you browse to another folder on your computer or network and copy the files there.
- When you right-click on a folder or item in the Project or Network View, the menu now includes the following:
  - SEND To→ZIP FILE: creates a new zip file containing all the files in the selected folder, including all sub-folders. The new zip file will be saved in the parent folder of the selected folder.
  - SEND TO  $\rightarrow$  MAIL RECIPIENT: opens up a New Message window from your default mail client (e.g. Outlook) and attaches all the files in the selected folder.
- There is a new property, *Firmware Version*, available on all device nodes in the Network Tree. It is also available in the Property Sheet reports for devices.
- There are updates to the Niagara Devices (R2 and G3/Ax) nodes on the Network Tree:
  - All Niagara devices have a new *Niagara Software Version* property on the Properties' *Software* tab.
  - The G3/Ax devices now have the *License* tab. If you copy the license file onto the device node, you can import the information from it into the fields on the *License* tab.
  - There is a new Property Sheet report specifically for Niagara Devices, which includes all the license properties.

- There is a third I/O Point shape, *Splittable I/O Point*, which allows you to separate the two halves (Point Name/Software Tag and Common Point Name/Device BOM Tag) and selectively hide the Common half.
  - Right-click on the shape to hide or show the Common.
- The font sizes for the text in all three I/O Point shapes have been adjusted.
  - The default size is now 6 points.
  - In the horizontal versions, the larger box will grow as needed to support larger Software Tag or Controller BOM Tag names (instead of shrinking the font, as it had been doing).
- The Actuator shape was not updating when a different part number was selected. This has been fixed.
- On a Valve Schedule, when you specified a quantity and then selected a Part Number, the quantity was changing to 1. This has been fixed.
- The names on the Analog Output terminals for the Continuum 804, 814 and 920 have been updated.
- The terminal names on the Analog Output terminals for the StruxureWare AO-V-8 and UI-8/AO-V-4, as shown in a sensor or I/O point, have been updated to VO1 to VO8.
• The Terminal Block shape has been revised to anchor itself at the top so that it grows downward. Issues with the tag and label text being incorrect have also been resolved, but may require a new instance of the Terminal Block shape to be pulled from the stencil and reconfigured.

#### **Estimate Module**

• You can now specify negative values for the *Contract Amount*, *Markup Dollars*, *Markup Percent* and *Margin Percent* fields.

### **Release 3.3.382**

October 10, 2012

- There is a new report that compares the systems in an Estimate project with those in a Design Project (or two Design or Estimate projects, if you wish).
  - Start by selecting the first Estimate or Design Project (or an Area node within either) and right-clicking and selecting TOOLS $\rightarrow$ SELECT FOR COMPARE SYSTEMS.
  - Next, right-click on the other Estimate or Design Project (or an Area node within either) and right-clicking and selecting TOOLS  $\rightarrow$  COMPARE SYSTEMS WITH *NAME OF FIRST NODE*.
  - An Excel report will be generated with multiple tabs.
    - The first tab shows a list of systems in either or both and compares their Typical Of values, their total Part Cost and total Point Count. There
    - There are then two tabs for each system, one comparing the list of parts and their other comparing the list of points.
    - Hyperlinks on the System Names in the first tab and the upper-left cell in the other tabs will help you navigate around the workbook.

- Any time you update a Designer drawing when the project is checked out, a System Tree will be created in your project that allows you to view all your parts and points without running a report.
  - You can add Areas to the System Tree and move the generated System nodes into them to organize the systems in the tree.
  - You can manually update the System Tree. On the Design Tools tab there is a new command to UPDATE SYSTEM TREE. Select this and a new Area node named *System Tree* will appear off the root of the project.
  - You can compare the System Tree from a Designer project to one from an Estimate project, as described above.

• The Bill of Materials shape now allows you to "anchor" the shape to a specific corner, so that as new parts are added the specified corner of the shape remains in place and the text grows in the other directions.

#### **Estimating Module**

- You can now specify a custom markup for each subcontract.
  - On the Estimate's Subcontract tab there are three new columns. If you check the Custom Markup checkbox, the Markup Pct specified will be multiplied by the Quote Amount to calculate the Custom Markup.
  - The Summary tab will show that the Markup percentage is applied to the Total Cost *less the total of those subcontracts' Quote Amounts*.
  - The total of the subcontract's Custom Markups is then added to show the *Total Markup*.

# **Release 3.3.380**

September 19, 2012

#### **Core Module**

- In the Multi-File Library browser, you can filter the libraries to those that include an Estimated System and/or a Designer Drawing.
- The SE Room Controller shapes have a more detailed set of Part Selection filters.
- Some issues with the Task Checklist and Reports have been fixed.

# Release 3.3.379

September 11, 2012

- You can now use *Microsoft Visio Viewer 2010* (a free download) to view Visio files. To use, download and install the Visio Viewer and then check the box in the TOOLS→OPTIONS 3<sup>RD</sup> PARTY SOFTWARE tab.
  - <u>Note</u>: This tool cannot edit Visio files, nor can it be used with the Designer Module for tools that require Visio files to be scanned such as reporting and printing.
- There is a new menu option, VIEW→FOLDER ID NUMBERS, which will display the Studio ID number for all the items on the trees. This can be helpful when manually searching through the local project file system.
- You can export the folder structure and files from any node in your project to Windows (right-click, EXPORT→EXPORT FOLDERS AND FILES)

- You can import the folder structure and files from Windows onto any node that can store folders (right-click, EXPORT → IMPORT FOLDERS AND FILES). This feature was available from some nodes' TOOLS menu, but the older menu item has been removed.
- You can export any portion of your project to a new *Studio Export File* format (.stexp file) (right-click, EXPORT→EXPORT TREE NODES). This file represents the node, all its children, and all their properties and comments (e.g., for System nodes, this include Parts, Points and Labor). The export file does not contain files, emails or tasks.
- You can import a Studio Export File by copying it onto the Files of any item in the project and selecting IMPORT → IMPORT TREE NODES). Doing so will recreate the tree structure stored in the export file. You can also import the file by double-clicking it in the Files tab.
- You can store Exported nodes, such as Systems, as files in a Multi-File Library.
  - Simply copy/paste or drag/drop the node onto the Files tab of the library when editing it.
  - When you insert the file into your project, it will offer to import the imported items onto the currently selected node.
- In the Local Files list of the Open Project dialog, the Quote Numbers and Job Numbers are now shown.

- There is a new stencil, *SE Room Controllers*, which contains four new shapes for the SE7200, SE7300 and SE7600 line of room controllers (formerly Viconics). The older Viconics stencil is listed under Older Stencils and its shapes should not be used anymore.
- The Software Tag field in an I/O point and sensor shape can now be 60 characters (instead of 16).
- An issue where certain Visio files marked "Microsoft Visio Drawing" would not be available to be marked as Designer drawings has been fixed.

#### **Estimating Module**

- You can now select the Software Tag Set to use when specifying point details. The set is specified in the *Estimate Settings* dialog (from the *Estimate Summary* tab) on the *Other* tab. The selected Software Tag Set is part of the Estimate Model.
- SE branches will now see the correct net pricing in the parts browser and when importing from SOCC, Designer or Excel.
- There is a new feature that generates a report of all the costs in an estimate distributed amongst the systems using custom percentages. On the Estimate node, select REPORTS, then the new ALLOCATE COSTS TO SYSTEMS tab. This feature allows you to control how global costs, such as Subcontracts and PM Worksheet hours, are allocated to each system (for the purpose of reporting). The results can be viewed on the new tab as well as in the new *Allocated Costs (By System)* report.

August 17, 2012

#### **Core Module**

• The *Description* property of each tree node will be shown as a Tool Tip (pop-up text) as you hover over it. You can also use a vertical bar character (|) to indicate a line break for multi-line pop-ups (v3.3.379). This behavior can be disabled from the TOOLS→OPTIONS WORKSTATION OPTIONS tab.

#### **Design Module**

- You can now use the Print Manager to create a PDF version of the drawings. In the Printer list, select "<< PDF File >>" as the printer. You will need to install the free PDF Generator tools from the TOOLS→OPTIONS dialog to enable this feature.
- The *report SE Non-Preferred Recommended Alternatives* had a calculation error for extended quantity. This has been fixed.

#### **Estimating Module**

• In the Subcontractor Settings (or Estimate Settings) on the Labor Codes tab, there are three new subcontractor related columns. The first two, *Union/Prevailing Rate* and % *at Union/Prevailing Rate*, allow you to specify a rate for subcontractors working at Union or Prevailing Wage rates and the percentage of the labor expected to be done at that rate. The *Effective Rate* will then be calculated with these parameters and used in the subcontractor calculations. For example, if the Cost Rate is \$75, the Union Rate is \$100 and the % Union Rate is 25%, the Effective Rate will be \$81.25.

#### **Parts Database**

• When browsing for parts and specifying the start of a Part Number (which causes the current list to scroll to the nearest part beginning with those characters, the list will rescroll after other filters are changed and applied.

# **Release 3.3.376**

July 11, 2012

In the Parts Database, there is a new Extended Property Category (Controller) that allows the number of Physical Points [AI, DI, UI, AO, DO and UO] to be specified. This information is propagated through the modules in the following ways:

#### **Core Module**

• When browsing parts in TOOLS→BROWSE ALL PARTS, you can select a 'Device Category' (Relay, Sensor or Controller) that shows and allows filters on additional properties, such as Mounting Location (Relay) or the Physical Point Counts of Controllers.

#### **Estimating Module**

- When browsing on the Parts Tab of an Estimate System, you can select a 'Device Category' (Relay, Sensor or Controller) that shows and allows filters on additional properties, such as Mounting Location (Relay) or the Physical Point Counts of Controllers.
- When you add a part to a System, the Point Counts will be copied to the part in the system.
- When you edit a part in a System, you can specify your own Point Counts.
- On the Points tab of a System, there is a new section that shows the total number of physical points from the controllers in that system's Parts list, and shows how the points specified on the Points tab can be allocated to them (including if there are extras or a shortage).
- There is a similar section on the Points tab of an Area that aggregates the Point Counts for all the area's systems. You can choose whether you want extra points from one system to offset missing points from another.
- There are two new reports: *Points Used and Available (By System)* and *Controller List (By System)* which include the Point Count information.

#### **Parts Database**

• There is a new Extended Property Category (Controller) that allows the number of Physical Points to be specified. The existing controller parts in the database have been updated with their Point Counts.

Other enhancements in this release include:

#### **Designer Module**

- In the Sensor shape, when browsing the part list, the extended properties (e.g. Mounting Location) showed as "(null)". This has been resolved.
- The issue with printing reports using Excel 2007 has been resolved.
- Some older Designer shapes that only allowed 8 character BOM tags have been expanded to allow 16 characters.
- The MNB-70, MNB-V1 and MNB-V2 now allow for a 120 ohm resistor on the terminating resistor.

#### **Estimating Module**

- The issue with printing reports using Excel 2007 has been resolved.
- In the System Parts tab, you can choose to show or hide the Point Count and/or Labor Factor columns.
- In the Update Parts to Database utility, you can choose to selectively update sets of fields: Vendor, Point Counts and/or Labor Factors.

- The material reports now properly format part numbers that contain only numeric digits (such as the SE Xenta products).
- When you edited a part in a system's part list, the Cost Multiplier would revert to 1.000. This issue has been fixed.

#### **Parts Database**

• When browsing for sensors, the extended properties (e.g. Mounting Location) showed as "(null)". This has been resolved.

### **Release 3.3.374**

June 20, 2012

#### **Core Module**

### Release 3.3.373

June 15, 2012

#### **Core Module**

- The *User's Guide* and the *Setup and Administration Guide* have both been updated substantially.
- The check for PDF files to download has been optimized. You will be given the option to bypass the check before it calculates exactly how many files are available for download (this check was found to be time consuming, especially on VPN or other slow connections). You can also choose to have it bypass the check altogether from the TOOLS→OPTIONS dialog on the *PDF Files* tab.
- There is now an explicit timeout parameter for attempting to connect to the office SQL server (TOOLS→OPTIONS, *Workstation Options* tab).
- The Struxureware AS-L and AS-B items on the network tree now allow for the selection of different bus types for the ports.

- The lines representing wires from the controller shape terminals could be inadvertently moved when snapped to a connected point of another shape. This problem has been resolved.
- Issues with opening the WireTag stencil have been resolved

June 7, 2012

#### **Designer Module**

• The scanning and printing of Designer Visio file have been sped up substantially.

#### **Estimate Module**

- There was a discrepancy in how the Risk allowance was being calculated and displayed. The *basis* for the Risk allowance (the amount multiplied by the Risk percent) is the sum of all the *Itemized Costs* (i.e., the top row of the summary). It does not include any other costs. However, the basis value <u>displayed</u> on the *Allowances* tab also included the *Travel Expenses* amount, which affected the dollar value for *Risk* itself as show on this tab. The actual amount calculated on the Estimate Summary and all the other calculations was correct (e.g. did not include Travel Expenses), so would not have matched the one on the Allowances tab if there were Travel Expenses. The Allowances tab has been updated to match the Summary (e.g. the basis will no longer include Travel Expenses). This will not affect the calculation of new or existing estimates.
- The Customer Pricing report had an error. If a system had material but no labor, the system was excluded from the Customer Pricing report. This has been corrected.

### Release 3.2.371

May 23, 2012

#### **Core Module**

• In an Enterprise environment with the Parts Database managed from a central server, users on other servers would be notified that there are updates to the Parts Database even after the updated central database was published to the other servers. This will no longer occur.

#### **Designer Module**

• The MNL-V2 and MNL-V3 controllers in the SE I/A LON stencil have been updated to properly show a resistor on the AO, if selected.

#### **Estimate Module**

• The Import from SOCC (Concerto Suite) utility (ESTIMATE→TOOLS→IMPORT SYSTEMS FROM SOCC ESTIMATE) has been updated to import from newer SOCC estimates that are locked with a password. This utility requires that SOCC be used to open the estimate when performing the import into Studio' estimate.

- The Import from Designer System feature has been updated.
  - You can export one or more systems from Designer by running the *Export System Parts* and *Export System Points* reports together.
  - With this generated report, you can import Parts and Points from the Excel workbook into one or more systems on an Area or Estimate (TOOLS→ESTIMATING→IMPORT SYSTEMS FROM EXCEL).
  - $\circ$   $\,$  For more detail, select the utility from the Area or Estimate and review the instructions.
- The INCLUDE/EXCLUDE AREA OR SYSTEM command is now available directly from the estimating toolbar.

#### **Parts Database Manager**

- The tools for update parts and PDF files from Smartware's Master Server and to publish the changes to all your users are now organized together into a new Dashboard (FILE→DASHBOARD).
- You can now duplicate any existing part (Smartware or Company) and make it a new part in the Company database. Select DATA TABLES -> PARTS, select the part and either click the DUPLICATE PART button or right-click the part and select DUPLICATE PART.
- If you receive an error while synchronizing your Company's Parts Database with the Smartware Master Server, you will not be allowed to Publish the database to your users until you synchronize successfully.

### Release 3.2.367

May 2, 2012

- The Automation Overview tool now allows you to create custom formats for the text beneath each device on a bus, using a combination of device properties (description, address, location installed, etc.) and text.
- Renaming a folder on a server with impersonation set resulted in a duplicated folder and misplaced files. This problem has been resolved.
- The Enterprise Management tools now include reports for Users, Licenses, Projects and Custom Parts across all servers in the enterprise.

- A number of shapes have been upgraded. Existing instances of these shapes will be upgraded if you double-click them in a Designer drawing.
  - A number of the I/A BACnet and I/A Lon shapes have been upgraded to display jumper wiring correctly and more flexibly.
  - The I/NET MR-VAV-AX shape was upgraded to correct the naming of DO1-3 and the polarity of the power connections.
  - The InfiStat shape was upgraded to work with the NC2's Continuum I/O Module Ordering utility.
  - The I/NET P16UISO was upgraded to allows DI values on the inputs.
- The Design Module utility to create template WorkPlace Tech applications has been upgraded to work with WorkPlace Tech 5.8 and Windows 7.
- The Sensor shape can now be freely rotated.
- For SmartClone shapes that are designed for a single part (and therefore do not display the PART LIST button for browsing and selecting a different part), you can force the PART LIST button to appear by going to TOOLS→OPTIONS and selecting ALWAYS SHOW PART LIST BUTTON FOR SMARTCLONE SHAPES.
  - This behavior can also be specified in the SmartClone shape when creating or editing it in the Smart Clone Designer by clicking the SMART CLONE PROPERTIES button, going to the SMART CLONE→PART NUMBER FILTERS tab and selecting the FILTER PART NUMBER LIST BASED ON THE FOLLOWING option and leaving all the filters blank.

#### **Parts Database Manager**

• There is a new option to extend the timeout when updating and synchronizing the Parts Database to the Smartware Server. Select OPTIONS → OPTIONS in the Parts Database Manager.

# **Release 3.2.366**

April 4, 2012

- There is a new option on the TOOLS  $\rightarrow$  PARTS menu to browse all the sensor parts.
- You can now add new WorkPlace Tech 5.8 Application files directly to a device or folder node by right-clicking in the Files tab and selecting NEW→WORKPLACE TECH 5.X APPLICATION
- In the Enterprise Server Management (available only to companies with multiple related server installations), there are new User and License reports that combine the lists from all the servers.
- An issue where deleted projects would show in the New Project Template list has been resolved.

- If a node has any e-mails or tasks on it, the corresponding tab will be shown regardless of the View settings. An icon will also appear next to the tab name.
- When you drop or paste a file or e-mail to a node, the appropriate node and tab will be selected automatically.

- You can mark individual drawing files with a Drawing State, such as *Preliminary*, *Construction*, *As-Built*, *Submitted* and *Approved*. You can also display any of the Project Properties (which have been expanded) on a drawing, title page or title block.
  - There is a significantly expanded set of Project Properties available on the Properties tab when the root Designer node is selected.
  - There are new shapes in the *Page Add Ins* stencil that displays the Drawing State or a Project Property. You can add these to your drawings directly or to your custom Title Block shape.
  - You can set the Drawing State value for a drawing using the Revision Notes tool. This will update the text in each Drawing State shape on each page in the drawing (including those in a group, such as the Title Block shape; it will not, however, look any deeper than the first level of grouping)
  - The Project Property Labels will be updated automatically each time a drawing file is open. You can also use the Revision Notes tool to update multiple files explicitly.
- The *SE iPortal Import Sheet* reports have been upgraded and moved to the main Reports tab list.

# **Release 3.2.363**

March 6, 2012

- There is a new version of the User and License Management Tool (ADMIN→MANAGE USERS AND LICENSES):
  - New, cleaner design with licenses and remote users on tabs
  - Export to Excel Utility
  - Request and change user passwords
  - View, add and remove remote users
  - Reset License Accounts
- When editing Part Packages in the Parts Database Manager, points, labor and comments are now properly editable.
- The *xP Display* module is now available in the *Continuum* (*xP Modules*) stencil to add to the Network Tree.

• When using the Niagara R2 Convert Station Backups utility, the system assumes that Niagara is installed in the *C:\Niagara* folder. You can specify a different path for the Niagara root folder in the *Smartware Studio.ini* file (located in *C:\ProgramData\Smartware Studio\Config* on Windows 7 or *C:\Documents and Settings\All Users\Application Data\Smartware Studio\Config* in Windows XP). Add a section and entry such as:

[Niagara] R2RootFolder=E:\Niagara

#### **Estimating Module**

- There is a new tool available from the Estimate menu that imports each Part Package from the database into a separate system in the estimate. This allows you to use the Material/Update Parts to Database utility to validate the parts and find obsoleted and replaced parts and to run other reports.
- Parts with no vendor specified were not being shown in the Material By Vendor summary table (they were included in all other calculations and reports). This has been resolved.

#### **Design Module**

- The *Designer Module/Design360 User's Guide* is available from the Help Menu (it will download automatically).
- Many of the SE Visio shapes have been updated to fix minor discrepancies in point names and problems with auto-insert on certain point types. The icons for all the stencil shapes have also been redone to be larger and more representative of the shape. You may need to update the Parts Database and Clear and the Update the Design Project Database (from the Design Tools tab) to see all the changes correctly.

# Release 3.2.362

February 17, 2012

- There is a new Help menu command for sending an email to <u>PartSupport@smartwaretech.com</u>.
- When importing a Network Tree from a Niagara R2 device, Lon Devices are no longer flagged with an incorrect part Number (Xenta 913)
- The issue where the Job Number or Quote Number specified on New Projects created from a template does not get stored in the new project has been resolved.
- The problem creating Multi-File System Libraries on Windows XP has been resolved.
- The problem saving changes to the Project Group folder structure has been resolved.

- The distance between the wires on both versions of the I/O Point Shape is now selectable.
- The Auto Insert's "Remove Empty IO" feature no longer resets properties of existing points.
- The issue with the "Unable to Register Assembly / Regasm" message when opening a Designer drawing has been resolved.
- Issues relating to the licensing of the new SE I/A BACnet and LON stencils have been resolved.
- Issues relating the Smart Charts have been resolved.

### **Release 3.1.358**

January 12, 2012

#### **Design Module**

- There is a new Guide available on the Help menu: Upgrading from Designer Suite 2005
- New versions of the Schneider Electric I/A BACnet and I/A LON controllers are available in two new stencils (*SE IA BACnet* and *SE IA LON*). These shapes replace the previous versions in the older versions of the stencils.
- The *Insert Project Properties* feature of the Valve, Damper and Air Flow schedules has been fixed.
- A rare issue where a Valve, Damper or Air Flow schedule cannot be properly scanned by Designer because the Used Area of the spreadsheet is set as a range of full columns has been resolved.

- When working with WorkPlace Tech Application Files:
  - There should be fewer instances where WorkPlace Tech notifies the user that *"WorkPlace Tech 5.x has updated Visio. The Visio path settings have been updated. WorkPlace Tech will attempt to restart Visio and continue."* Also refer to the OTHER SOFTWARE tab in the TOOLS→OPTIONS settings when dealing with this issue.
  - You can now create a new, blank WorkPlace Tech application file from the NEW menu when right-clicking on a folder's Files tab.
  - When opening WorkPlace Tech application files from within Smartware Studio, Studio will not remove its temporary files so that in the unlikely case that the modified WorkPlace Tech application files do not get copied back to the Studio project they can be retrieved manually with the help of our support team.
- You can now restore deleted folders and items back to the Project and Network Tree from the Recycle Bin.
- The Project Group tree will now retain the state of which folders are expanded (instead of expanding all each time the Open Project form is shown).

- The Continuum Network Tree import has been upgraded to handle I/O Modules.
- For distributed folders (e.g., custom templates and reports), you can now specify a list of files that should be removed from each workstation when the folders are synchronized.
  - Create a file named *recall.txt* in any distribution folder on the server.
  - In this file, list the names of the older versions of files (one per line) that were distributed that you want removed from the corresponding folder on each workstation.
- You can now add custom items to the NEW menu that appears when you right-click on a folder in a tree or in the blank area of a folder's FILES tab.
  - The file should be named *Custom Templates.xml* and be stored in the *Custom Templates* folder on a workstation (and server, to distribute to all users). Refer to the TOOLS→OPTIONS→DESIGNER tab and the ADMIN→DESIGNER MODULE MANAGEMENT→TEMPLATE FILES tab for more detail on these folder locations.
  - The file should contain records in a format such as:

```
<?xml version="1.0" encoding="utf-8" ?>
<TemplateFiles>
       <TemplateFile>
               <Description>Our Letterhead</Description>
               <FileName>Acme Letterhead.doc</FileName>
               <DefaultFileName>New Letter.doc</DefaultFileName>
               <MenuSection>Custom</MenuSection>
       </TemplateFile>
       <TemplateFile>
               <Description>Our Legend Page</Description>
               <FileName>Acme Legend.vsd</FileName>
               <DefaultFileName>Acme Legend.vsd</DefaultFileName>
               <MenuSection>Systems</MenuSection>
               <FileType>Designer Suite Drawing</FileType>
       </TemplateFile>
</TemplateFiles>
```

- The actual template files should also be stored in the *Custom Templates* folders.
- The valid values for *MenuSection* are: *Custom*, *Systems*, *Schedules* and *Blanks*.
- The *FileType* is only needed for Designer-specific file types, and can be: *Designer Suite Drawing, Designer Suite Valve Schedule, Designer Suite Air Flow Schedule*, etc.

December 19, 2011

#### **Design Module**

• The splash screen that appears when a Visio drawing is opened will automatically disappear after 15 seconds (allowing Visio errors to be seen).

#### **Core Module**

• An issue that caused Job and Customer Site nodes to show plain folder icons in the Project Tree has been resolved.

• In the ADMIN→USER AND LICENSE MANAGEMENT tool, and Administrator can now change a user's password.

# Release 3.1.356

December 12, 2011

#### Estimating

- The new *Customer Pricing (By System)* report shows the total Sell Price for Material and Labor for each system
- The new *Labor Hours and Dollars (By System)* report shows the total labor hours and dollars by system, fully inflated by the Global Labor Adjustments and the Labor Cost Escalations.
- The new *Schedule of Values Worksheet* report creates a worksheet for assigning estimate Material, Labor and Subcontract cost to each system with adjustments for mobilization and various customizable weightings.

### Release 3.1.355

December 8, 2011

#### **Core Module**

- Checking in a project should now be considerably faster, especially when using a slower connection.
- The start-up time for the application should be faster when using a slower connection.
- In the Parts Database Manager, if you edited the Custom Labor Factors for a part the changes were not saved unless you did it twice. This has been resolved.

- The *Bill of Material* report has been upgraded from DS 2005 and is available on the main Reports tab.
- The new *Part Listing (Detailed Validation)* report will show all the parts in a project along with validations, such as being in the database, Obsolete Date, Alternate/Replacement Part Number, Manufacturer and Vendor Part Number. (This replaces the DS 2005 *Parts Found* report).
- The new *Parts Database Obsolete Parts* reports shows all parts in the Parts Database that have been obsoleted, along with an Alternate Part Number if available.
- The Bill of Material shape in the *Page Add Ins* stencil now allows you to optionally show the Manufacturer or Vendor Part Number (along with the Database Part Number).
- The *DS 2005 Tools* menu in Visio when editing a Design drawing has been renamed to *Design Tools*.

- There is a new Obsolete Parts error check available from the Design Tools menu in Visio.
- Schneider Branch offices will see the Schneider Branch prices when browsing parts.
- In the project tree, the icons for System and Schedule folders may have reverted to the plain folder icon. They will now show correctly.

November 21, 2011

#### **Core Module**

• When logged into a remote server, shortcuts to other projects now open properly.

### **Release 3.1.353**

November 19, 2011

#### **Core Module**

- You can create New Projects from Template Projects
  - To allow new projects to be created with a *Template* or *Profile* of pre-defined folders and/or files, a server projects can now be designated as a *New Project Template*.
  - In the Open Project list, an administrator with the *Set Project Group and Templates* project permission can right-click on the server project and select ADMIN→MAKE PROJECT A NEW PROJECT TEMPLATE.
  - In the Open Project list, an administrator can check the new ONLY SHOW 'NEW PROJECT' TEMPLATE checkbox to filter the Server Project List to just the template projects.
  - When creating a New Project, you will be prompted with a PROJECT TO DUPLICATE list of the template projects of the selected project type. If you choose one of these templates, it will be duplicated to create the new project.

- You can import an existing Designer Suite 2005 Project from the New/Open Project dialog.
- The Relay shapes (Separable Relay and Pt-To-Pt Relay) have been upgraded with new filter selection properties and updated part and terminal wiring data in the Parts Database.
- The general purpose Sensor shape in the Sensors & Transmitters stencil has been significantly updated to allow for more customization and flexibility. The part data for this shape, however, is not yet complete.

- The properties for a Multi-File library, along with the selection and search forms, have been overhauled significantly.
- Resolved a bug in the report engine that would generate data from the wrong set of files and/or systems.

November 9, 2011

#### **Core Module**

- In the ADMIN→USER AND LICENSE MANAGEMENT utility, under VIEW LICENSES, there is a new button to Export the license list to Excel.
- The SE Project Builder Help file is available from the Studio360 Help menu (if Project Builder is licensed for that workstation)
- There is new Help menu command that will create an e-mail to the Company's administrators for users to request permission changes, etc.

#### **Design Module**

- When browsing parts and accessories from a Visio part shape, there is a filter for "Show SE Strategic Parts Only"
- The Multi-file Library dialogs have been enhanced, including the ability to compare multiple libraries on their distinctive properties.

#### **Estimate Module**

• A new format for "Workbook" reports allows a report to be embedded within a template workbook with additional worksheets.

# Release 3.1.351

November 1, 2011

#### **Core Module**

- The ADMIN→SERVER CONFIGURATION tool has shortcuts for downloading and installing Beta versions.
- The TOOLS  $\rightarrow$  DESIGNER SUITE  $\rightarrow$  REMOVE DS FOLDER PREFIXES menu item has been put back onto the folder nodes.

- When new Designer/Design360 projects are created, they will now automatically have Systems and Schedules folders.
- In the Table of Contents generator, when you edit an additional line item it will no longer offer to move the item to the top or bottom (which reordered the items unintentionally). You can reorder items in the TOC by dragging and dropping them in the list.

- When opening a Table of Contents file, you will be given the option to open it in Visio alone without the normal TOC functionality
- If you close the TOC Visio file and click update, it will not reopen the Visio file.

October 27, 2011

#### **Core Module**

• The Assign Permission Sets to Folders feature was not finding the correct matching folders. This has been fixed.

#### **Estimate Module**

- When estimating a system, you can edit a part in the part list by right-clicking and selecting Edit.
- There is a new report, Estimate Report Field List, which documents the various fields you can use in custom Booking reports.
- When adding packages to a system, obsolete parts will be pointed out (and swapped out if alternate part is available).

#### **Parts Database**

- In the Parts Database Manager, the Export Existing Parts and Update Existing Parts are now available from the File menu.
- When editing Parts in the Parts Database, you can override the Labor Factors and/or the Category used to determine Labor Factors for all parts.

#### **Design Module**

- The Valve selector will now show the images of the valve body and actuator when browsing from a Valve Schedule
- The Controller Checkout report now shows custom Device Address properties based on the controller line in the header section
- The System Point List report has been updated (from the Designer Suite 2005 version) and included in the new Reports tab
- The following SE issues have been resolved:
  - 93 The Xenta From/To fields work properly

### **Release 3.1.348**

#### October 14, 2011

- The following SE issues have been resolved:
  - $\circ~91-$  The Continuum I/O Module utility will work properly with the AC-1 series.

- If downloaded updated started too fast, could lead to a bad install state
- The Reports/Design sub-folder is distributed from enterprise to server to workstation
- The Part List button on the Accessories tab for new controllers and other shapes will now display all parts (instead of an error message).

October 14, 2011

- The Design360 Reports tab will work properly.
- MNB-1000-15 was added to the Network Tree. It can be put on a MNB-1000's new IO Bus.

### **Release 3.1.346**

September 16, 2011

- The Release Notes document is now available on the Help Menu.
- The Panel Device shape and the Automation Overview shapes have been redone, and moved to the Page Add Ins stencil.
- The Design360 Reports have been upgraded and new reports created. The older reports are still available (for the time being) on the "Reports (DS 2005)" tab.
- The following SE issues have been resolved:
  - 45 Resized the i2/b3-850, -851 and -853 to be 3" tall.
  - $\circ$  46 Resized the i2/b3-865 and -866 to be 4" tall.
  - $\circ$  93 Xenta 400s now all have a working LON bus, and the 527-NPR does not.
  - 113 Xenta 500s and 913 have shorter wires off the left and right sides.
  - 115 Ground Wires on Xenta 500s are now pointed to the right.
  - 117 Xenta 511:B and 913 Modbus Note has been redone to not say the word "Note."
  - o 178 Xenta 471 can now have I/O points connect to it.
  - 203 Removed {} brackets around addresses in I/Net shapes.
  - 204 Set the Maximum SCU Address to 30 when Address Mode is set to double.
  - $\circ$  211 Renumbered AOs to match controller for i2/b3/b4-920 and i2/b3-814.
  - 216 i2/b3-810 and -814 DIP switches now support both kinds of current 0-5V, 0-10V.
  - 214 Project Builder in Studio360: Project Builder was only supported with Excel
     2003 and Visio 2003. It will not work in Office 2010, and although it seems to work
     in Office 2007, we have had limited testing. Please see Lonnie with any questions.