

# Anterra Version 25.2 Release Notes

## Updates to Anterra Pivot Grids



These are general updates that apply to most of the grids through every module (Finance, Construction, and Service Management)

### Setting the Default Date for a Pivot Grid - KB

- Pivot Grids now support the ability to define the default date to show when visiting the grid, you can select from the following options when saving a grid:

Save grid? ×

Parameters, column order, width and filters are saved when you save a view.

**Save Grid As:**

Anterra Default View ▼

**Parameters:**

Saved Parameter	Value
Consolidation Group	All Companies
Project Manager	All Project Managers
Project	

**Default Date When Loaded:**

- Today
- Yesterday
- First Day of Prior Month
- Last Day of Prior Month
- First Day of Current Year

👤 Save Under My Grid 👥 Save As Shared Grid Cancel

### Pivot Grid Collapsed Grouping View - KB

We have enhanced the Pivot Grid collapse functionality significantly. (#6143) Here is a view of Margin Gain Erosion that is grouped by Division and Project Manager:

anterraBI Home Antera Statements Finance Construction Service Management Procure/Action Items Admin Reports to Test

Margin Gain Erosion All Companies All Project Managers 02/21

Collapse Pivot Table

↑ Division × ↑ Project Manager ×

Project Manager	Division	M... Tr...	C... St...	Project No/Name	Original Contr... Value	Original Cost Estimate	Origi... Profit	Origi... Profit %	Approv... Contract Value	Pen... Cont... Cha...	JTD Cost	JTD Forec... At Comp...	Forec... Profit
Antera Construction, Inc (1)													
Mary Smith (1)													
Mary Smith	Antera Construction, Inc		\$	03-055 Lexus of Channel View	3,348,496	1,473,338	1,875,158	56.00 %	3,700,088		427,268	1,818,903	1,881,185
					3,348,496	1,473,338	1,875,158	56.00 %	3,700,088		427,268	1,818,903	1,881,185
					3,348,496	1,473,338	1,875,158	56.00 %	3,700,088		427,268	1,818,903	1,881,185
General Construction (11)													
Doug Moffett (4)													
Doug Moffett	General Construction		\$	03-002 Clackamas Office Park #4	831,930	705,485	126,445	15.20 %	915,516	538	192,402	1,000,000	(84,484)
Doug Moffett	General Construction		\$	03-050 Austin Parkway Center	1,462,750	1,276,249	186,501	12.75 %	1,769,928		663,650	1,804,022	(34,095)
Doug Moffett	General Construction		\$	03-051 Summit Office Expansion	1,532,600	1,360,183	172,417	11.25 %	1,854,446		843,313	1,507,500	346,946
Doug Moffett	General Construction		\$	03-052 Walsh Road Subdivision	2,487,152	2,216,052	271,100	10.90 %	3,009,454		775,618	2,727,510	281,944
					6,314,432	5,557,969	756,463	11.98 %	7,549,343	538	2,474,983	7,039,032	510,311
John Laurent (1)													
General													
					24,143,408	19,859,061	4,284,347	17.75 %	28,045,087	49,805	8,742,705	24,588,085	3,457,002

When you click on the check box to the left of “Collapse Pivot Table” you create a drill through report!

Here is the Division Level:

anterraBI Home Antera Statements Finance Construction Service Management Procure/Action Items Ad

Margin Gain Erosion

Collapsed

Collapse Pivot Table

Division	Original Contr... Value	Original Cost Estimate	Original Profit	Approv... Contract Value	Pen... Cont... Cha...	JTD Cost	JTD Forec... At Comp...	Forec... Profit	Profit Gain/E...
General Construction	19,395,422	17,163,478	2,231,944	22,905,108	32,693	7,395,735	21,250,396	1,654,713	(577,231)
Antera Construction, Inc	3,348,496	1,473,338	1,875,158	3,700,088		427,268	1,818,903	1,881,185	6,027
New Construction	967,950	854,349	113,601	1,004,341	17,112	593,072	1,121,287	(116,946)	(230,547)
None	431,540	367,896	63,644	435,550		326,630	397,500	38,050	(25,594)

Clicking on the General Construction takes you down to the second pivot – Project Manager

Project Manager	Original Contract Value	Original Cost Estimate	Original Profit	Approved Contract Value	Penalties	JTD Cost	JTD Forecast At Completion	Forecast Profit	Profit Gain/Erosion
Doug Moffett	6,314,432	5,557,969	756,463	7,549,343	538	2,474,983	7,039,032	510,311	(246,152)
Mary Smith	8,159,401	7,298,138	861,263	9,872,895		3,376,125	8,760,382	1,112,513	251,250
John Laurent	1,952,789	1,747,746	205,043	2,362,875		625,841	2,167,234	195,641	(9,402)
Michael Perkins	2,968,800	2,559,625	409,175	3,119,995	32,155	918,786	3,283,748	(163,753)	(572,927)

Clicking on a Project Manager takes you to the detailed grid

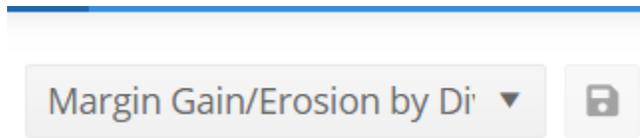
Project Manager	Division	M... Tr...	C... St...	Project No/Name	Original Contract Value	Original Cost Estimate	Original Profit	Original Profit %	Approved Contract Value	Penalties	JTD Cost	JTD Forecast At Completion
Doug Moffett	General Construction		\$	03-002 Clackamas Office Park #4	831,930	705,485	126,445	15.20 %	915,516	538	192,402	1,000,000
Doug Moffett	General Construction		\$	03-050 Austin Parkway Center	1,462,750	1,276,249	186,501	12.75 %	1,769,928		663,650	1,804,022
Doug Moffett	General Construction		\$	03-051 Summit Office Expansion	1,532,600	1,360,183	172,417	11.25 %	1,854,446		843,313	1,507,500
Doug Moffett	General Construction		\$	03-052 Walsh Road Subdivision	2,487,152	2,216,052	271,100	10.90 %	3,009,454		775,618	2,727,510

Note that there is a breadcrumb on top of the grid to navigate up to the top:

Collapsed > Division: General Construction > Project Manager: Doug Moffett

NOTES

1. You can save collapsed views! Simply click on the save icon beside the view name:



2. If you would like to see the hierarchy view of the pivot grid click on the ellipsis in the far left column:

Project Manager	Division	M...	C...	Project No/Name	Original Contr... Value	Original Cost Estimate	Orig Prof
▼ Anterra Construction, Inc (1)							
▶ Mary Smith (1)							
					3,348,496	1,473,338	1,8
					3,348,496	1,473,338	1,8
▼ General Construction (11)							
▶ Doug Moffett (4)							
					6,314,432	5,557,969	7
▶ John Laurent (1)							
					1,952,789	1,747,746	2
▶ Mary Smith (4)							
					8,159,401	7,298,138	8
▶ Michael Perkins (2)							
					2,968,800	2,559,625	4

## Other Pivot Grid Enhancements / Fixes

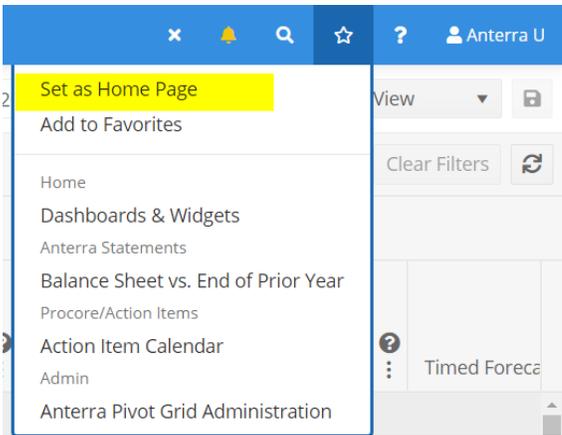
1. A bug was fixed addressing the date upon drilling-down and returning from the drill-down (#7526)

2. To Improve usability of Pivot Grids, we have implemented default widths to certain columns based on the type of data those columns show. Doing this prevents users from seeing incorrect characters in a column that is too small to display the data. (#7550, #7298)
3. Corrected an issue experienced by users when attempting to put a filter on a grid with no data (#7628)
4. Corrected an issue for columns without titles (#7542)
5. Support for updating Job Forecast Pivot Grid totals instantly during changes including standard aggregations and while addressing cross-column calculations. (#7297)

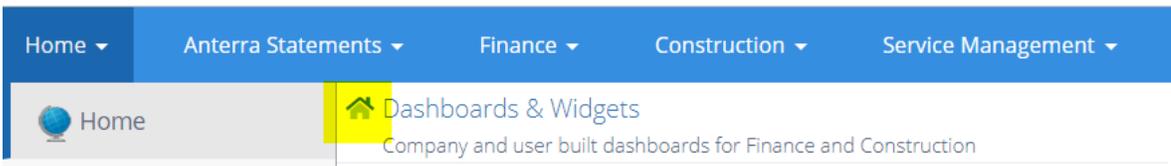
## **System-Wide Updates**

### **Set a page as your home page KB**

The favorites and default starting page of Anterra feature has been overhauled and now allows each user to set their default “Home” page, which loads immediately after login to Anterra. Navigate to the page you want to see when you log in, click on the “star” in the top right menu and select “Set as Home Page”

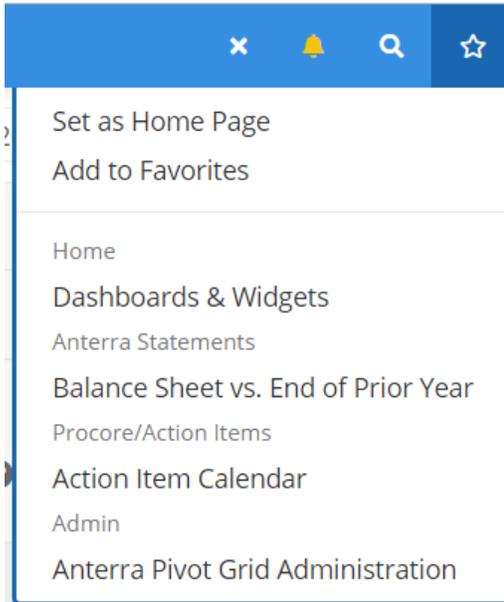


The page you select will show a “home” icon in its menu icon



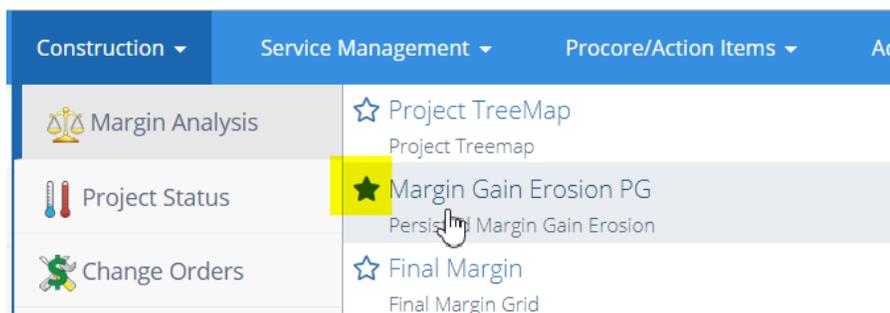
## Creating a Favorites Menu – KB

- Your favorites menu is under the Star icon in the top right of the menu bar, when you click on the star you see all of the menu items you have ‘favorited’ (#7558)



There are 2 ways to add items to your Favorite menu

1. Click on Add to Favorites under the Star when you are on the menu item you would like to add to your favorites list
2. Click on the “Star” beside any menu item to make it a favorite, the star fills in to let you know it is now one of your favorites.



To remove an item from your Favorites list simply unclick this same star on the menu item to clear it.

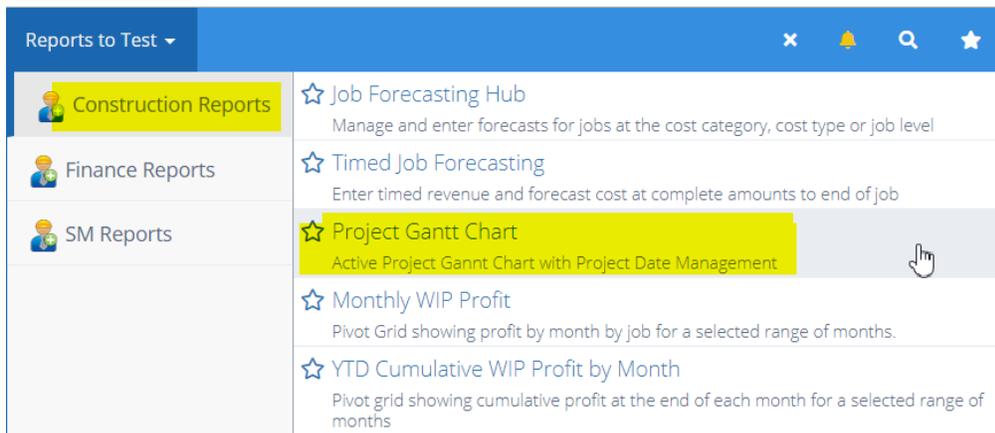
## NEW BI COMPONENT – Project Gantt Chart - KB

Anterra's roadmap for 2020 for construction is focused on job forecasting. The first major feature will be job cash flow forecasting. In order to forecast job cash flow project dates must be centrally managed. Most companies do not update project start and end dates in their accounting systems. Project managers typically are not given access to job setup where the date fields are located.

Anterra's first step to cash flow forecasting and job control is to provide a central Gantt chart that lets you:

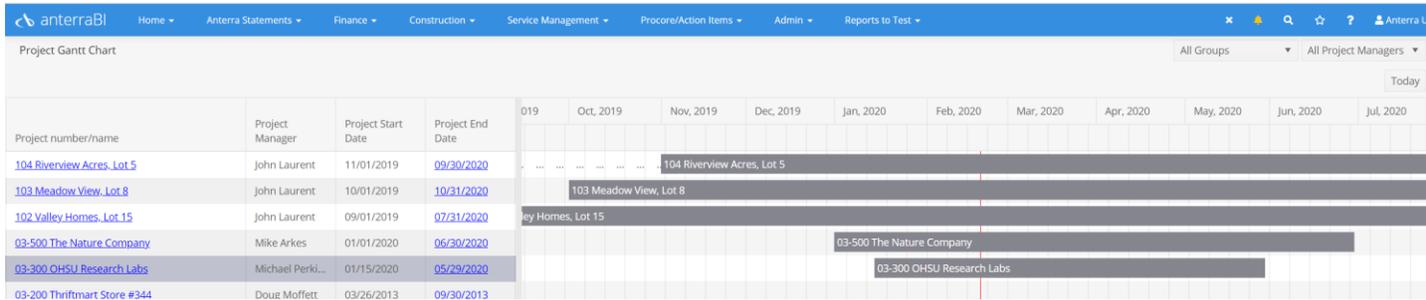
1. Set project start and end dates
2. Change project start and end dates (requiring the cost of a date change be identified)
3. Show a log of all date changes
4. Shows all active projects
5. Provides an overview of project timing by company, division and project manager

The Gantt chart component is under the Reports to Test menu:



Please contact Anterra if you would like to test the Gantt Chart – we will need to turn off the updating of project dates from your accounting system.

The Project Gantt Chart shows all active jobs



Clicking on a project name opens the date management pop up

### Manage Project Start / Completion Dates

**Project:** 104 Riverview Acres, Lot 5

**Change By:** Anterra UserUser

**Date of Change:** 02/20/2020 07:30:27

**Reason:** Material Delay in Supply

	Previous	New
Start Date	11/01/2019	11/01/2019 <input type="text"/>
End Date	09/30/2020	09/30/2020 <input type="text"/>
Total Days	334	334

**Cost of Change:**

**Recoverable / Change Order**

Fully Recoverable  
 Partially Recoverable  
 Not Recoverable

**Change Order #:**

**Notes:**

As you fill in the date changes you are asked for:

1. The reason for the change in dates –

**Reason:**

	Material Delay in Supply
Start Date	Material Delay in Supply
End Date	Behind Schedule
Total Days	Change in Project Design
	Change in Project Scope
	Design Issues
	External Factors
	Labor Shortage

You can maintain this list in the Admin > UI Administration > Action Item Administration where we added the project date change reason as a managed field. You can edit existing reasons, add, delete and order items.

2. Edit the start and end dates as required, the total project duration is displayed before and after you change dates:

	Previous	New
Start Date	11/01/2019	11/01/2019
End Date	09/30/2020	10/14/2020
Total Days	334	348

3. Enter the cost of the change and if it is fully recoverable, partially recoverable or not and a note. If you select fully or partially recoverable you are asked to enter the claimed amounts and the CO number

**Cost of Change:**

**Recoverable / Change Order**

Fully Recoverable  
 Partially Recoverable  
 Not Recoverable

**Change Order #:**

	Claimed	Approved
Days	<input type="text"/>	<input type="text"/>
Amount	<input type="text"/>	<input type="text"/>

**Notes:**

4. To see a log of project date changes click on the Project End Date on the Gantt Chart

anterraBI											
Project Gantt Chart											
Project number/name	Project Manager	Project Start Date	Project End Date	Oct, 2019	Nov, 2019	Dec, 2019	Jan, 2020	Feb, 2020			
<a href="#">104 Riverview Acres, Lot 5</a>	John Laurent	11/01/2019	09/30/2020						104 Riverview Acres, Lot 5		
<a href="#">103 Meadow View, Lot 8</a>	John Laurent	10/01/2019	10/31/2020						103 Meadow View, Lot 8		
<a href="#">102 Valley Homes, Lot 15</a>	John Laurent	09/01/2019	07/31/2020						102 Valley Homes, Lot 15		

104 Riverview Acres, Lot 5 Date Change Log											
Date of Change	Changed By	Reason of change	Start Date Before	Start Date New	End Date Before	End Date New	Project Days Before	Project Days New	Cost of Change	Recoverable	Notes
02/20/2020	anterra@anterratech.com	Other	02/05/2013	11/01/2019	08/06/2013	09/30/2020	182	334	0	Not Recoverable	establish dates
02/09/2020	anterra@anterratech.com	Weather Delay	02/05/2013	01/01/2020	08/06/2013	05/31/2020	182	151	10000	Not Recoverable	no

Page 1 of 1 1 - 2 of 2 Items

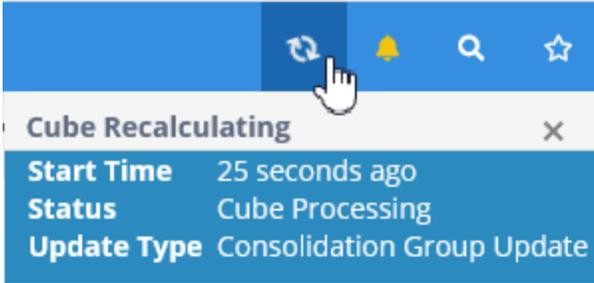
Many clients have asked us for job cash flow forecasting. We are working on automated job cash flow forecasting using S curves by project type. If you would like to participate in the development of cash flow forecasting please email Bruce Vanderzyde – [bvanderzyde@anterratech.com](mailto:bvanderzyde@anterratech.com)

## Update to Anterra’s Appearance

- We have updated the look and feel of the site to make BI components easier to read and cleaner to view. Pivot grid subtotals show in darker grey, bolded text is now slightly darker.

Project Manager	Project No/Name	Original Contr. Value	Original Cost Estimate	Original Profit	Original Profit %	Approv. Contract Value	Pen. Cont. Cha.	JTD Cost	JTD Forec. At. Comp.	Forec. Profit	Forecast Profit %	Erosi... KPI	Profit Gain/E...	% Cost Comp
<b>Doug Moffett (5)</b>														
Doug Moffett	03-002 Clackamas Office Park #4	831,930	705,485	126,445	15.20 %	915,516	538	192,402	1,000,000	(84,484)	(9.23 %)	●	(210,929)	13 %
Doug Moffett	03-050 Austin Parkway Center	1,462,750	1,276,249	186,501	12.75 %	1,769,928		663,650	1,804,022	(34,095)	(1.93 %)	●	(220,596)	32 %
Doug Moffett	03-051 Summit Office Expansion	1,532,600	1,360,183	172,417	11.25 %	1,854,446		843,313	1,507,500	346,946	18.71 %	●	174,529	56 %
Doug Moffett	03-052 Walsh Road Subdivision	2,487,152	2,216,052	271,100	10.90 %	3,009,454		775,618	2,727,510	281,944	9.37 %	●	10,844	28 %
Doug Moffett	03-200 Thriftmart Store #344	492,203	438,398	53,805	10.93 %	517,353	4,980	298,601	589,380	(72,027)	(13.92 %)	●	(125,832)	51 %
		<b>6,806,635</b>	<b>5,996,367</b>	<b>810,268</b>	<b>11.90 %</b>	<b>8,066,696</b>	<b>5,518</b>	<b>2,773,583</b>	<b>7,628,412</b>	<b>438,284</b>	<b>5.43 %</b>		<b>(371,984)</b>	
<b>John Laurent (4)</b>														
John Laurent	03-058 Legacy Ford	1,952,789	1,747,746	205,043	10.50 %	2,362,875		625,841	2,167,234	195,641	8.28 %	●	(9,402)	23 %
John Laurent	102 Valley Homes, Lot 15	104,650	90,976	13,674	13.07 %	104,650		89,927	121,000	(16,350)	(15.62 %)	●	(30,024)	74 %
John Laurent	103 Meadow View, Lot 8	124,300	108,095	16,205	13.04 %	124,300		101,632	108,000	16,300	13.11 %	●	95	94 %
John Laurent	104 Riverview Acres, Lot 5	202,590	168,825	33,765	16.67 %	206,600		135,070	168,500	38,100	18.44 %	●	4,335	95 %
		<b>2,384,329</b>	<b>2,115,642</b>	<b>268,687</b>	<b>11.27 %</b>	<b>2,798,425</b>		<b>952,471</b>	<b>2,564,734</b>	<b>233,691</b>	<b>8.35 %</b>		<b>(34,596)</b>	
<b>Mary Smith (5)</b>														
		<b>24,143,408</b>	<b>19,859,061</b>	<b>4,284,347</b>	<b>17.75 %</b>	<b>28,045,087</b>	<b>49,805</b>	<b>8,742,705</b>	<b>24,588,085</b>	<b>3,457,002</b>	<b>12.33 %</b>		<b>(827,345)</b>	

- We improved system performance and load times by updating the underlying code and themes used. Styles and other quality of life improvements were added as well for smoother report loading. (#7553, #7266, #7564)
  - To Improve the display of data update status information we have altered the 'Work' heading to become 'Workflow Step'. In doing so it now shows when work has been completed. We also cleaned up the database removing unused tables speeding up the Job status changes. The data status icon appears as spinning circles when working, as an "X" if there is an error or as a checkmark if everything has processed successfully (#7263)
- Here is how the status looks after you click "Update Anterra" after making changes to your Consolidation Group mapping:



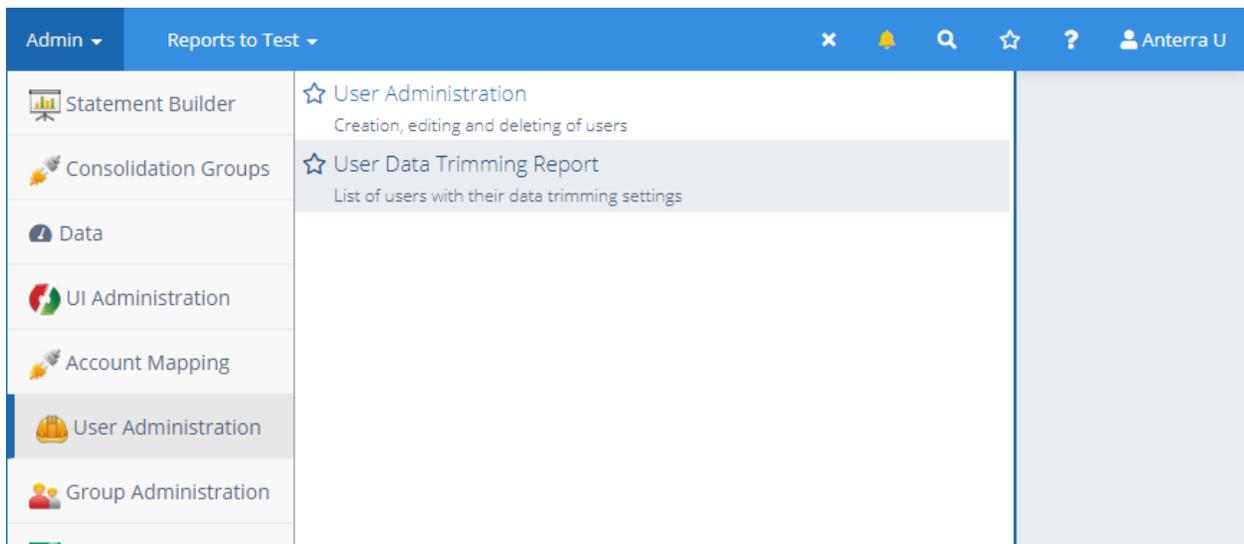
## Updates for Anterra Administrators



Most of these updates are focused on helping keep the right users seeing the right information.

### NEW REPORT – Data Trimming Security Report - KB

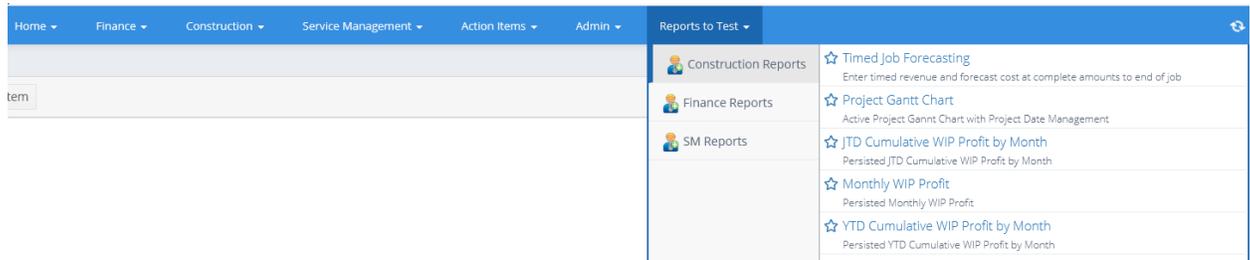
- Data Trimming Security Report - To help clients better understand what users see, we have implemented user security audit reports. You can reach this area of Anterra’s site by going to Admin then User Admin then User Data Trimming Report. This is a Pivot grid allowing clients to save views. (#7528)



### Report Testing Menus - KB

- We have added a new main heading “Reports to Test” that allows users with the report testing security role(s) to see new Anterra reports that haven’t been released to all of the

users in their Anterra system. To keep things organized and easy to administrate, new reports are sorted by module which can have different reviewers depending on the setup of your organization based on roles (e.g. Finance, Real Estate, Construction, Service Management, and Other). Once a report has been tested it can be moved to any location in your menu structure using the Menu Administration tool (Admin – Menu Administration) (#7406)



## Other Administration Fixes/Enhancements

- We now allow user exclusion from module counts in user admin. To do this go to the edit user pop up and check the box under Business Area Modules called “Exclude From User Module Counts”. When the box is selected for a user it removes the users checkbox from the main user page when “Show Modules” is selected. (#6992, #7362)
- Fixed an error that appeared when attempting to delete a hidden menu item in the Menu Administration tool (#7689)
- Fixed an issue with copying users in User Administration when users had more than one business entity item within one business area entity ( (#7566)
- Added support to our new Job Runner process for customers with multiple installations of anterraDataCenter (ADC) across multiple servers (#7589)

# Updates to Widgets

- Fixed an issue with user-created calculations of a percentage that caused them to not be shown properly during the creation process in the preview (#7686)

# Updates to Module Specific Functionality

## Real Estate Module Updates

- Clients wanted Pivot Grids released for real estate, so we made that possible. We now have the ability to have Pivot grids for Rent Roll, Sales Reports and Tenant Health. (#7423, #7501)

## Finance Module Updates

### General Updates

- Users with the Account Flagging and Mapping Role set will now receive Unmapped accounts notification via e-mail at 8am users time. These emails will be sent to remind users of unmapped accounts. (#2967) – REVIEW EMAIL FORMAT W DEREK
- Fixed an issue where after saving changes on the Account Mapping tool the system did not launch the appropriate back-end updates automatically (#7695)

## AR Collection Management: Customer Hub / AR Invoices / Action Items / AR Notes



This was a major focus of this release

- Improved performance for AR Invoice Pivot grid load times, and addressed speed of getting outstanding invoices for customers with large numbers of records to load more quickly by updating our caching methods. (#7419, #7187, #7014, #7674)

- Improvements to syncing customer addresses to Customer Hub. (#7012)
- Fixed an issue with filtering for organizations on the Action Item Calendar and Action Item Pivot Grid. (#7611, #7586)
- Removed an incorrect column from the details section of Customer Hub shown after selecting an invoice in the grid. (#7718)
- Fixed an issue that prevented users from being able to change the type of an existing action item in certain cases. (#7599)
- Improved error messages shown by the AR Notes features, and addressed an issue with saving new AR Action Items for affected customers. (#7244, #7551)

## **Construction Module Updates**

- Gantt chart for managing project dates (#7468, #7456, #7368, #7366, #7367)
- Fixed a bug where the Default forecast level for a new project was not set (#7693)
- Added a new column in grid administration for project description (#7407, #7448)
- Improve data refresh time for Forecast Builder (#7256)
- Solved an issue with Job Forecasting Hub for clients with a single-section cost code structure (#7723)
- Addressed an issue where changing the selected Consolidation Group on Job Mapping didn't always update the interface with the properly filtered jobs (#7706)
- Addressed a change in how Microsoft delivers Bing Maps that caused various mapping widgets to not work (#7660)

## **Service Management Module Updates**

- We have added Technician from the assignment as column on AR Action Item Grid (#7588)
- Change Technician column to use the primary technician from the assignment rather than the Technician associated with the work order (#7445)
- Work Order Throughput Pivot grids (#7449, #7488, #7567)

## **Other Updates**

### **Equipment Updates**

- Corrected an issue causing Revenue Utilization report to load slowly (#7417)

### **anterraDataCenter (ADC) Updates**

- GL only update added as option for customers (#7459)