ConstructConnect Takeoff
v. 2.5.0
Release Date: July 21, 2020

V.2.5.0 is a scheduled upgrade to ConstructConnect Takeoff that includes several new features, changes, and many bug fixes.

Contents

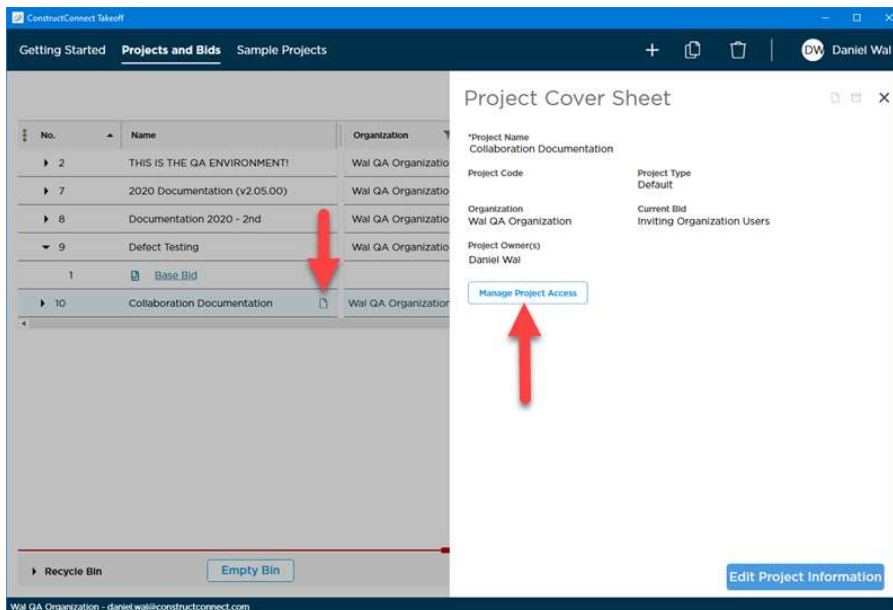# Features

Takeoff Project Collaboration

Invite users outside your Organization to collaborate on your projects.

The Takeoff Platform allows an individual's e-mail address to be associated with a *user* for only one Organization. However, some companies have their workforce split into several Organizations (think regional offices or even sub-companies) and they'd like to share projects within that workforce, even though the users are in different Takeoff organizations. Additionally, sometimes, project owners may want to ask a subcontractor or engineer to collaborate on a project without giving him or her access to the entire organization.

Project Managers can now invite users not affiliated with their Organization to collaborate on a project-level basis. These external users can be granted Read Only, Markups, or Takeoff and Markups Access rights, they cannot be made Project Owners. This means, you don't have to worry about a collaborator duplicating your project or extending access to others.

To invite an "external" user,

Open the Project Cover Sheet and then the Manage Project Access screen.

Enter a valid e-mail address and then select the level of access you want to grant this user.

Click the **Add** button, this user is added to the Pending section.

You can adjust their Access level or even delete them from the Pending list.

**Note… if the Project Owner grants "Takeoff and Markups" access, but the invited user does not have a Takeoff license (in their Organization), the invited user will be limited to "Markups Only" access. Only licensed-users can perform or edit takeoff.

Changes are not saved, and the notification is not sent, until you click the **Save** button.
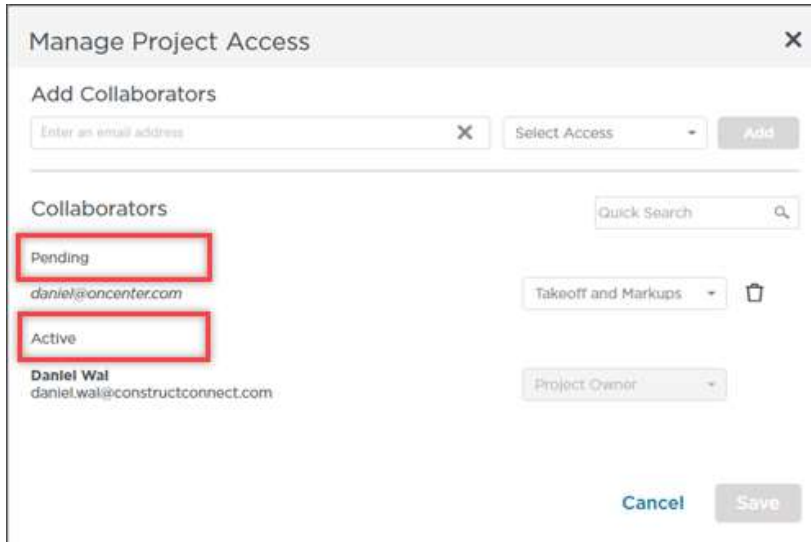
- Keep reading for how the invited party is notified about this collaboration request.
- See below for more information about the Manage Project Access screen.

Send Takeoff Project Collaboration invitations (invitations are visible through the app for now).
When you add an "external" user to a project, he or she receives a notification in the application.

Project Owners can see who has been invited and if they've accepted the invitation in the Manage Project Access screen.

- Pending – External users you have invited but who have not accepted your invitation to collaborate.
- Active – All Organization users who have access to this project and "external" users who have accepted an invitation to collaborate.

As Project Owner, you may want to contact the people you invite to collaborate and let them know what you want them to do and explain how to proceed. If the invited party does not have a Takeoff Organization, Sales needs to get in touch with them and set up a trial to provide them access to ConstructConnect Takeoff.

Provide ability to update or remove collaborators' rights.

As Project Owner, you can change any user's Access level (except yours, of course), or delete a user from this screen which removes their access entirely. If they have a bid open, the program will close to force them out of the bid and remove the project from their Projects and Bids List.

Notification Icon and Notification Drawer

### In-app Notifications to manage project sharing invitations.

Next to your name/icon in the upper-right corner, you find the notification icon .

When you have notifications you have not viewed, the blue dot appears on the icon.

Click the notification to open the Notifications panel.

Provide ability to view, accept or decline Takeoff Project Collaboration invitations within CC-Takeoff.

In the Notifications panel, you see all notifications you've received in the past five days. After five days, the notification is removed (the Project Owner would have to re-invite you).
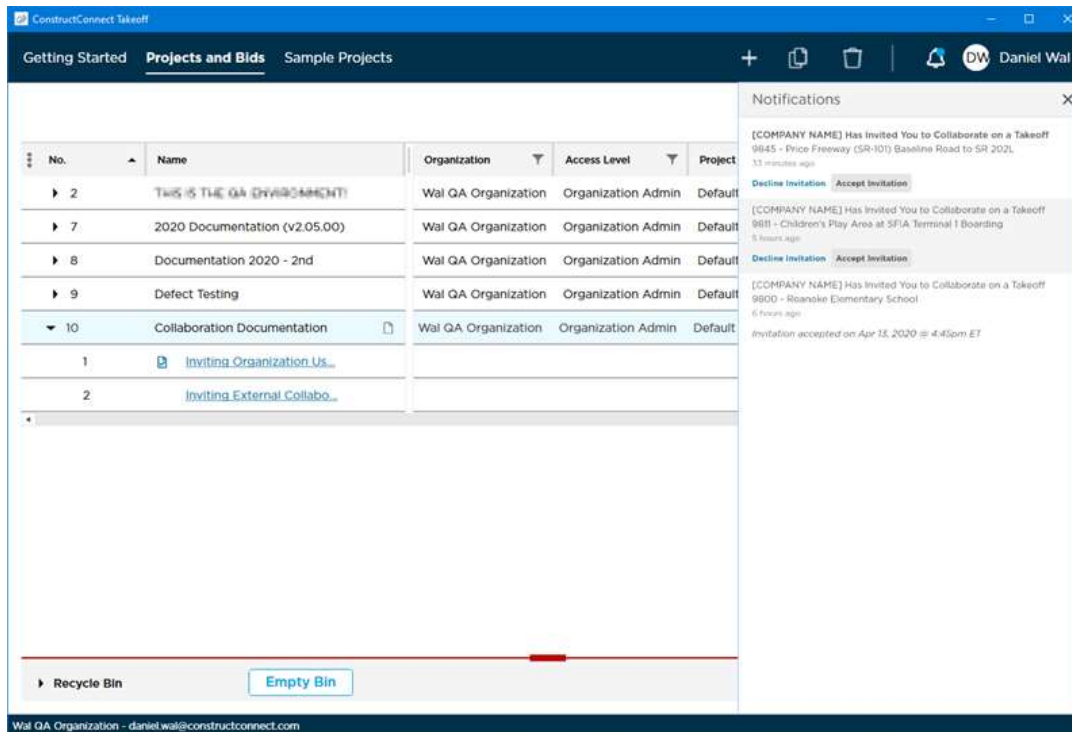
You can Accept or Decline invitations in the Notifications panel.

- **Accept** – the project is added to your Projects and Bids List and the notification is removed.
- **Decline** – the notification is removed, if you declined in error, contact the Project Owner who invited you and ask him or her to re-invite you.

Notifications are removed from the Notifications panel immediately when you Accept or Decline them, otherwise, they remain in the list for five days.

# Changes
Manage Access Updates

Update the Manage Project access dialog box and workflow to make it easier to control project access in a large organization.

We updated the project permissions workflow, based on customer feedback.

When you create a project, instead of adding all users in your Organization to it (as Project Owner), only you will have access to it (as Project Owner) and any Organization Admins (they'll be able to see the project and edit its permissions, but if they don't have a Takeoff license, they wouldn't be able to edit it). You choose who gets added to this project, instead of having to remove a bunch of users who don't need access to it.

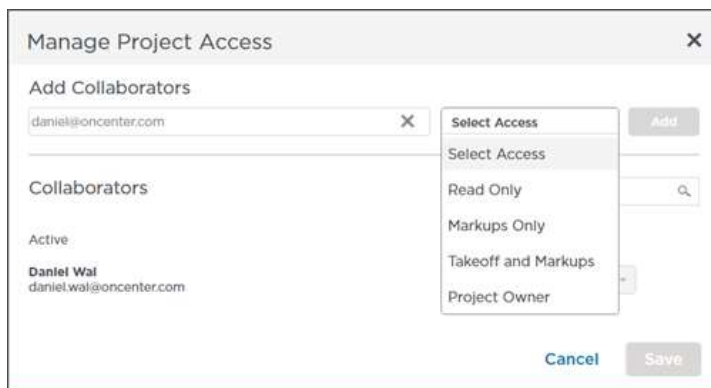To add an Organization User to your project,

Open the **Project Cover Sheet** to get to the **Manage Project Access** screen.
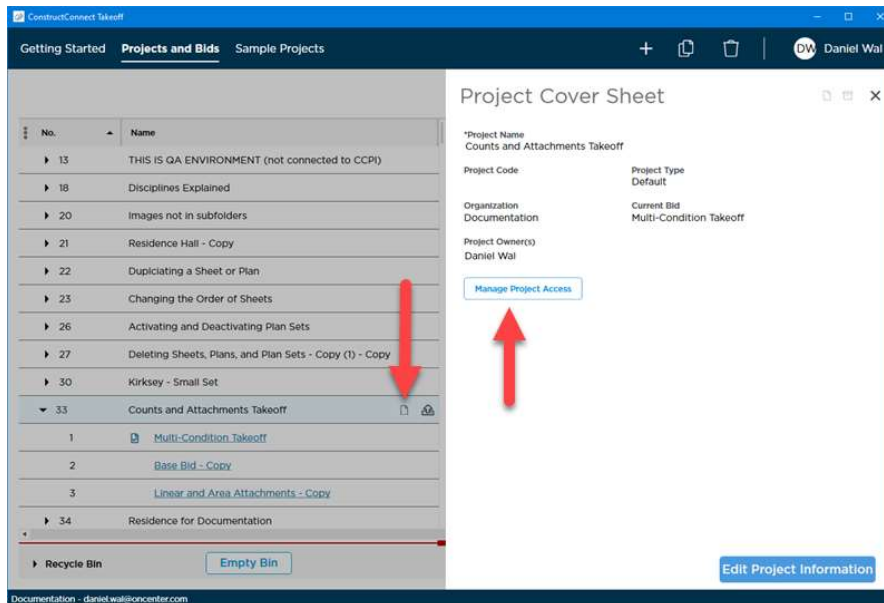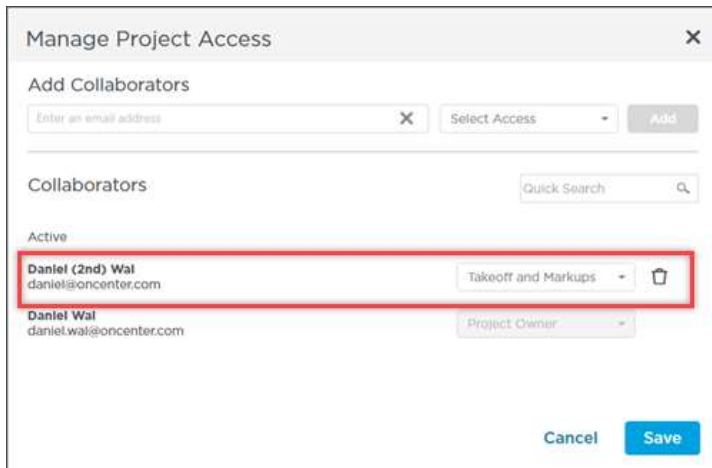
In the Manage Project Access screen, start typing the name or e-mail address for a user in your Organization. If you click in the name box without typing anything, a list of all Org Users displays.
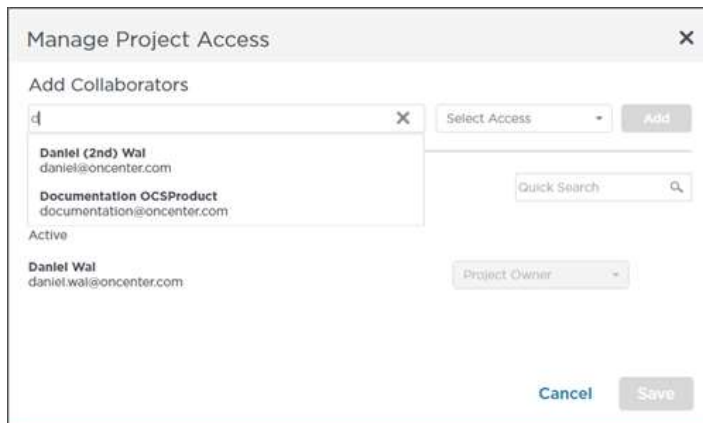
Click on the appropriate user and then select the Access level you want to grant him or her.

Click the **Add** button to add this use to the Active list.

You can adjust their Access level or even delete them from the list.

Changes are not saved until you click the **Save** button.

- After making an Organization user an Active user in a project, the project shows in their Project and Bids List – the person inviting them to collaborate needs to communicate to them their expectations.
- To adjust an Active user's Access level, open the Manage Project Access screen, locate them in the list and select a new Access level. Click **Save** to apply your changes.
- To remove an Active user from this project, open the Manage Project Access screen, locate them in the list and click the trash can on their row. The project will no longer be shown in their Project and Bids List – if they were working in the project at the time, their running application will close.

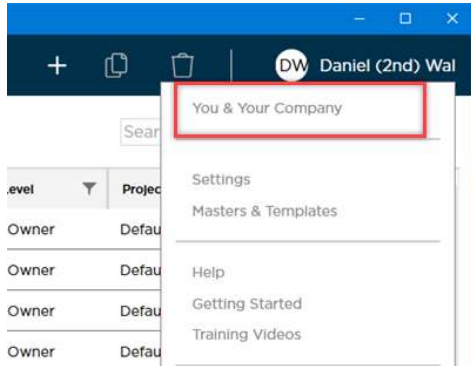Provide ability to search for user who has access to a project.
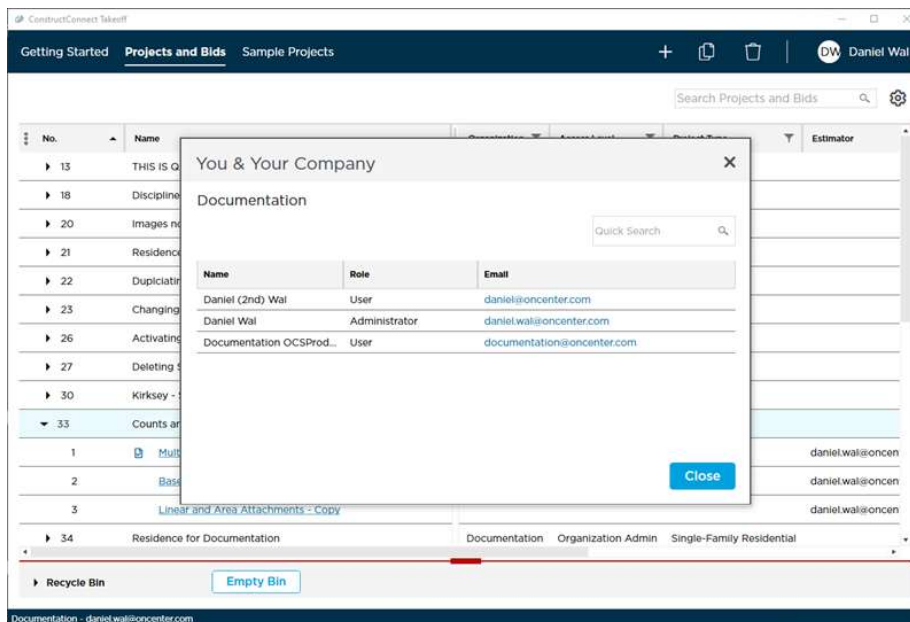You can search the list of Active Users using the Quick Search box, just below the Add button.

New Options under the Help & Settings

You & Your Company

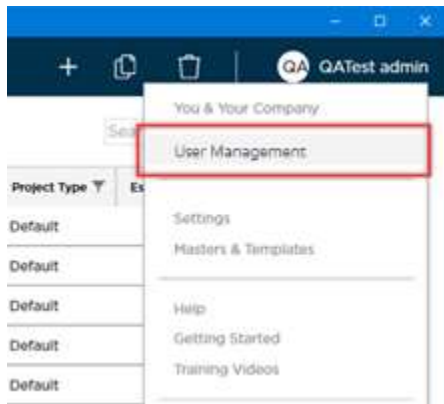Add a "You and Your Company" option to the Help & Settings menu.

This opens a screen where you can see all the users in your Organization.


User Management

If the logged-in user is an Organization Administrator, they see a "User Management " option to the Help & Settings menu.
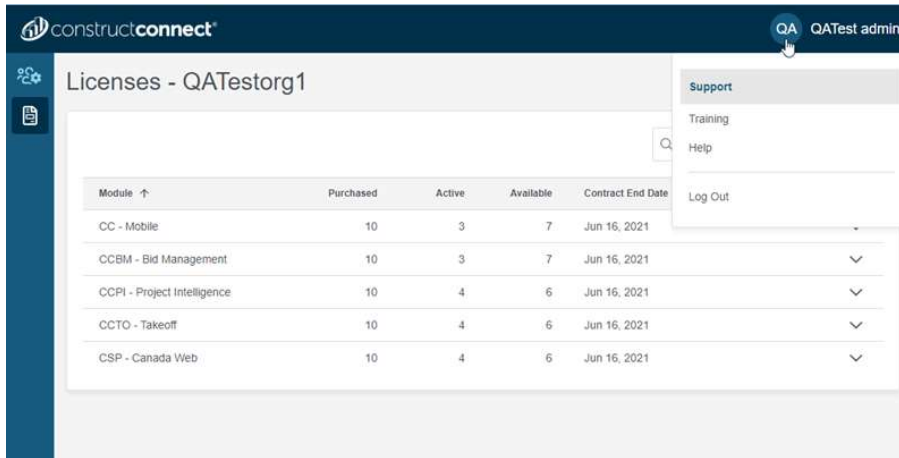
This option opens the Self-Service Portal in the default web browser.

Administrators have access to **Users** (User Management) where they can add (Invite) new users, delete users, and remove licenses from a user who no longer needs one but remains part of the organization.

For now, to change a user's Role, contact your Customer Success Manager at ConstructConnect.
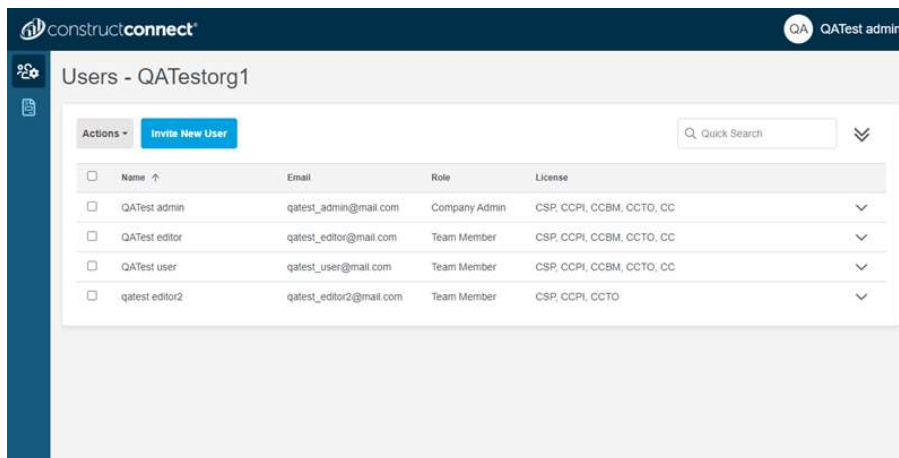
Administrators also have access to **Licenses**. They can see what they own and how many are in use and available. They can also see when their current subscription ends so they can be on the lookout for their renewal.
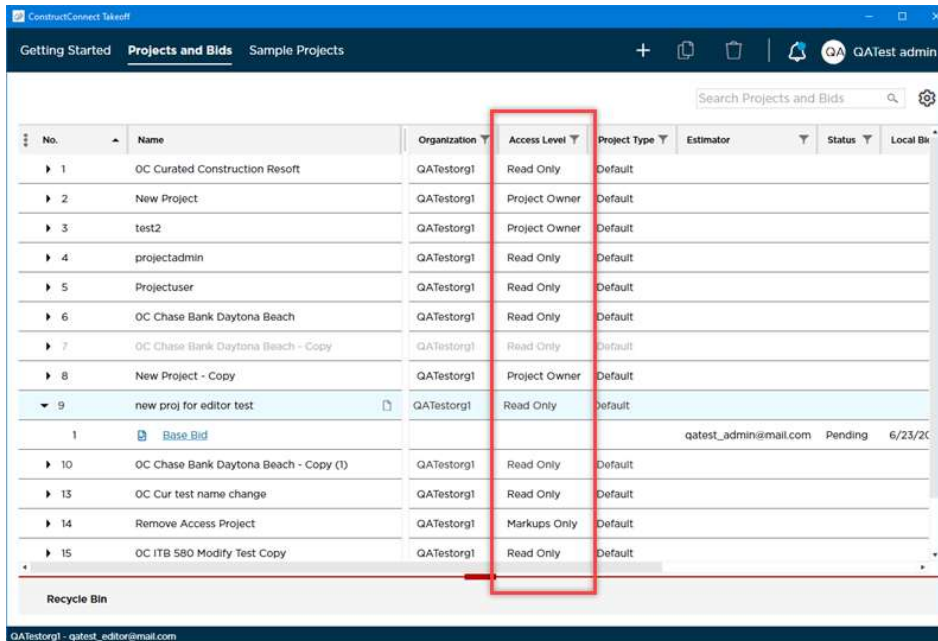
The Self-Service Portal is documented fully along with the other Platform applications at: help.app.constructconnect.com.

Projects and Bids List

If you are an Organization Administrator, you'll see your actual Access Level in the Access Level column on the Projects and Bids List, not "Organization Administrator".

Although the Organization Admin's Access Level can be set to anything, as an Admin, he or she has unrestricted access to all projects and bids in the Organization. If he or she has not been added as an Active User, the "Access Level" field is blank on the Projects and Bids List.

Fixes

We fixed several bugs in this version, most identified during QA testing that customers likely would never encounter. The following are those likely to be encountered by an end user or reported by an end user originally:

- Opening project from ConstructConnect Project Intelligence or Document Viewer opens the Takeoff Project and Bids List with projects in Recycle bin visible in the list of active projects and eventually the application crashes.
- If you detach the Worksheet Tab, then apply a column filter, when you leave the Worksheet Tab and return to it, the filter icon is not colored (indicating a filter is set).
- Deleting/deactivating a Plan Set for a Sheet on which there exists Multi-Condition Takeoff crashes the application.