PMWEB Release Notes

Angular modernization, the AI Assistant, and platform enhancements.

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PMWEB Release Notes

Overview

This release completes the Angular modernization effort across the platform and adds a number of new capabilities.

Angular conversion

This release includes the Angular conversion of all remaining pages in the Plans, Assets, Workflow, Portfolio, and Tools modules. For the large majority of these pages, the change is visual and structural: the same functionality in a new interface, following the patterns established in previous releases, so users can keep working the way they already do. Key benefits include:

- A modern, consistent interface across the platform
- Faster data loading
- Support for multiple tab editing
- Ability to use more advanced controls
- Smoother navigation between tabs and sections, with no full page reloads
- More consistent behavior across the platform, since shared components (date pickers, grids, dropdowns) now behave the same way everywhere
- Better responsiveness across screen sizes and window widths
- A stronger foundation for building future features faster

AI Assistant

PMWEB now includes an AI Assistant panel, available from a button in the top bar on every record page. It lets users find records, open a specific record, create new records or Adaptive Forms, and get contextual help, all through natural-language chat, without leaving the page they're on.

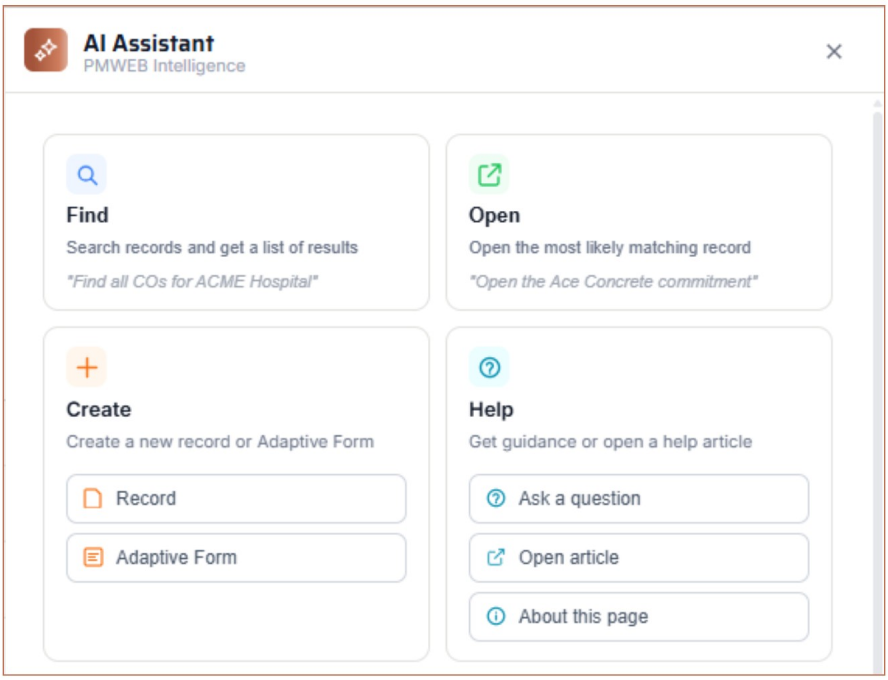


Figure 1. The AI Assistant panel.

- **Find** Search across records and get back a list of matching results as clickable links. Example: "Find all COs for ACME Hospital." When you click the Find button, "Find" is entered in the chat field, the chat field gets the focus, and you can begin typing right away.



Figure 2. A Find request in the chat field.

  Results are returned as a list in the AI Assistant pane, and each item is a hyperlink.

- **Open** Jump straight to the single most likely matching record, opened in a new tab. Example: "Open the Ace Concrete commitment." When you click the Open button, "Open" is entered in the chat field, the chat field gets the focus, and you can begin typing right away.
- **Create** Start a new record or an Adaptive Form directly from chat. When a record is created, AI Assistant confirms with a link to the new record, so you can open it when you're ready. When you create an Adaptive Form, AI Assistant first asks for a detail level and a short description, then generates the form.
- **Help** Get contextual guidance on the current record type or workflow. Example: "How do I submit this CO?" *Ask a question* gives focus to the chat field so you can begin typing right away. *Open article* opens the online help topic in a new tab. *About this page* gives an AI summary of the current page.
- **Feedback** Every AI response includes a Copy button and thumbs-up/down feedback; thumbs-down opens a short comment box where users can share details.
- **History** Recent AI interactions, both on the current record and from other records, are kept in a history panel that can be reviewed or cleared.
- **Administration** Admins turn AI on per security group from the Security page, and users see a disclaimer

the first time AI is enabled for a group they're in.

AI Assistant notes

- AI Assistant supports creating a growing set of record types, with more to be added.
- Search and summaries respect existing row, field, and project permissions, so users see only information they can already access in PMWEB.
- AI Assistant responses are grounded in specific source records. If a response doesn't match what you expect, use the Feedback feature, described above, to let us know.

Other enhancements

Workflow changes

- APM rules now have their own page and Manager page
- Business Processes enhancements:
  - Business Processes now have a Manager page
  - The Business Process designer has been restructured and now works directly on the page, replacing the previous visual designer popup
  - You can toggle between the diagram and table views; both show the same edits
  - A separate Main tab is also available
  - Use the fifth segment of the breadcrumbs to load a business process
- Record Types now has its own page. Use the third segment of the breadcrumbs to load a level.
- Role assignment is now managed in Role Manager
- Role Manager now has its own page. Use the third segment of the breadcrumbs to load a level.

BI Report Center changes

- In addition to the folder tree, you can now navigate using interactive breadcrumbs within the page, with type assist filtering
- Toolbar buttons allow report management
- Reports are now organized in a table
- The drag & drop project loader has been retired as part of the redesign
- The Reports Preview popup has been redesigned to include a report thumbnail

Account and Asset Class fields on cost-related record types

Account and Asset Class are now available as data fields across all primary cost-related record types. Both fields are single-select dropdowns sourced from PMWEB advanced lists (Inactive items excluded). When a

Cost Code is selected, its Account and Asset Class values are automatically copied to the record, replacing any existing values.

Available on: Initiatives, Estimates, Pre-bid, Bid Packages, Budgets, All Adjustments Tabs, Forecasts, Budget Requests, Journal Entries, Commitments, Prime Contracts, Online Change Requests, Change Events, Contract COs, Commitment COs, Production, Requisitions, Progress Invoices, Miscellaneous Invoices.

Both fields are also available through the API. Support for additional data fields across cost records will continue to expand.

Cost center management

A new "Cost Center Type" selection list, plus a Cost Centers tab and grid on both Locations and Projects, with a percentage-cap business rule on each, automatic copying of cost centers from a Location to its Project, and cost center data carried over when a project is copied.

- New "Legal Entity" field in Portfolio/Companies
- New "Cost Center Type" list in Portfolio/Selection Lists
- New "Cost Centers" tab in Locations
  - Users can add, edit, and delete lines in the grid
  - The tab is available in Security/Groups, the integrations API, and Language Manager
  - The Cost Centers grid includes these fields:
    - Cost Center
    - Paying Legal Entity
    - Percentage
    - Inactive
    - Associated Leases
  - Built-in percentage validation
    - When lines in the grid are saved, the total of the Percentage column cannot exceed 100%. If it would, the save is stopped and a warning appears: "Total percentage cannot exceed 100%". The warning can be closed manually and clears automatically on the next valid save.
- New "Cost Centers" tab in Projects
  - Users can add, edit, and delete lines in the grid
  - When a Location is selected in a Project, the Location's cost centers are copied to the Project's Cost Centers grid
  - The same 100% percentage validation applies

Bid management

- **Bid Records: Cleaner Attachments Tab** The Attachments tab of bid records (e.g., Bid Packages) now shows only directly uploaded attachments, without the attachments uploaded as part of Bid RFI

questions. This applies to all bid record types that display an Attachments tab.

- **Bidding Contacts: Multi-Select & Notifications** The Bidding Contact field in the Bid Package header is now a multi-select control labeled "Bidding Contacts", and bid package notifications now go to all selected Bidding Contacts.
- **Bid Package: Company Contacts Multi-Select Field** A new "Company Contacts" multi-select field is available in the Details table on the Main tab of Bid Package records. The field is company-filtered: it shows only contacts belonging to the selected Company. It is available in security, layouts, and PMWEB Word queries, and notifications now go to all selected Company Contacts.
- **Bid RFI Publish To: Attachment Visibility Control for Online Bid** The "Publish To" option in the Bid RFIs tab now offers "All Bidders With Attachments" (previously "All Bidders") and a new "All Bidders Without Attachments" option. When the new option is selected, RFI attachments are not shown in the Online Bid, in either the Question Attachments field on the Bid RFIs tab or the Attachments tab of the Online Bid.
- **Online Bid: Streamlined Attachment Views** The "Attached By" field is no longer shown in the View Attachments popup and the Attachments tab of Online Bids. This change applies only to Online Bid records.
- **Bid Package Word Query: Awarded Company & Details Merge Fields** The PMWEB Word query merge field tree for Bid Packages now includes two new folders: an "Awarded Company" folder under Fields (with address and contact fields for the awarded bidder) and a "Details" folder under Columns (with all fields from the Details table on the Main tab). Both return empty values when the relevant data is not present at query runtime.

General settings & other

- **General Settings: Wrap Text in Grids** A new platform-wide "Wrap text in grids" checkbox is available in the System group of the System subtab on the General Settings tab. When enabled, all grids across the platform wrap cell text as needed so the full text is visible. The setting is unchecked by default.
- **Initiatives: Estimate Tab Enhancements & Navigation** Initiatives and Estimates are now better connected in three ways: the Estimate field in the Initiative's Estimates tab grid is a hyperlink, a "New Estimate" button creates a pre-linked estimate directly from the Initiative, and a navigation button inside the Project field on Estimate records takes you straight to the project.
- **General Settings: Copy Location Address to Project Address** A new "Copy Location address to Project address" checkbox is available in the Projects subtab of General Settings. When it is enabled and a user selects a Location on a Project record, these fields are automatically copied from the Location to the Project, replacing any existing values: Address 1, Address 2, City, State, ZIP, Country, Phone, and Fax. The copy works from both the Project page and the Project Center. The setting is unchecked by default and cascades at entity levels in the same way as other settings in the Projects subtab.
- **Stage Gates: Pre-Bid Record Type on Detail Lines** The Pre-Bid record type is now available in two places in Stage Gate detail lines: the Record Type dropdown (so users can categorize a detail line as Pre-Bid) and the Link Records popup (so users can browse and select a specific Pre-Bid record to link to a Stage Gate detail line).

- **Cost Code String Match: Workflow Branch & APM Rules** A new Workflow Branch Rule (and APM rule) evaluates whether any row in a cost record's detail section matches a specified cost code string condition. Six string operators are supported: Begins With, Contains, Not Contains, Ends With, Equals, Not Equals. The rule returns true on the first matching row found and the workflow advances to the first step under the rule.

Security & access

- A new "AI" setting is available at the top level of Security/Groups. It is unchecked by default for all groups.
- "Status" and "Revision" are now separate security settings for Progress Invoices
- All tabs are now available in Security/Groups for Online Bids, Bid Packages, and Pre-bids

Platform & other

Stage gates & templates

- **Stage Gates in the Copy Project Popup** When copying a project, all logical Stage Gates and their setup data are now copied along with it. Available when Stage Gates are licensed; checked by default.
- **Copy Stage Gates: Work Requests From a Template** The same Stage Gate copy behavior now applies when generating a Work Request from a template project.
- **Copy Stage Gates: Projects From a Template** The same Stage Gate copy behavior now applies when generating a Project from a template project.
- **Pre-Bid in the Stage Gates Setup Record Type List** Pre-Bid records can now be selected as a Record Type in the Activity Defaults section of Stage Gates Setup.

Login & access

- **SAML Login for PMWEB Admin** PMWEB Admin now supports SAML-based login.
- **Simplified Login Welcome Message** The login page now greets users with "Welcome to PMWEB," without a version number.
- **Clear License Message on Login** When no licenses are available, users now see a clear message explaining why they can't log in.

Data & forms

- **New ID Field on Items Manager** A new ID field is now available on the Items Manager page.
- **Dynamic fields in layouts** Dynamic fields can now be managed in layouts. For example, in Bid Packages/Bid Items, the dynamic columns for bidders can be shown, hidden, or moved as a group in the table's Layout dialog.

Other

- **Certificate-Based Email Authentication** Outbound email can now authenticate using a certificate, in addition to existing authentication methods.
- **Audit Trail on the More Button** Audit Trail is now accessible from the More button dropdown (e.g., from Commitments).
- **Project Field Dropdown With Navigator** The Project field in record headers is now a dropdown with a navigator button.
- **Import Tasks** A new "Import Tasks" option on the More menu opens the familiar Project Center picker to pull tasks in from another project, similar to the previous "Copy from Schedule" feature.
- **Zip File Upload Support in Attachments and Document Manager** Users can upload a zip file directly: in Attachments, its contents are extracted and attached individually; in Document Manager, the folder structure is preserved.
- **Webform Routes Bridged to Angular** Existing webform routes now open their Angular equivalents.
- **Schedule Changes in the Audit Trail** Changes to Schedules are now tracked in the Audit Trail.