



Power BI



Microsoft SQL Server

Report	Change Type	Report Pages	Description	SQL Table
All Reports	Enhancement	All	<p>Created report wide filters in the Power BI filter pane for the following items: "Account Name", "Department Name", "Office Name", "Program Name", "Project Active?", "Project Role", "Project Role User", "Region Name", and "Project Type". 'Active' filter was removed from all individual pages.</p> <p><i>*Please note this change required the renaming of the above fields to have user friendly names. If content was pinned to dashboards with these underlying fields, the pinned content will need to be removed and re-pinned with the modified content.</i></p>	N/A
CBI Procore Core	Feature	User Usage	Added new report that highlights individual user Procore record creation.	View=vwUserUsage Report
	Enhancement	Core Insights	Add new visuals for "Offices", "Departments", "Templates", "Projects By Program", and "Top User"	N/A
	Enhancement	Tool Configuration	Added in new visualization for "Tool Configuration" to visualization how broadly implemented each tool is across projects.	N/A
	Enhancement	Companies	Added in "created_at" and "updated_at" fields to the underlying dataset. Added new "Company Onboarding" visualization.	Table = CompanyVendor
	Users	Enhancement	Added in "created_at" and "updated_at" fields to the underlying dataset. Added new visualization for "User Creation (last 12 months)".	Table = CompanyUser
	Bug Fix	Project Trending	Fixed a bug impacting a small number of projects with the Submittal status snapshot logic.	Table = CBIData CountHistory



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CBI Procore Financials	Enhancement	Financial Insights	Added resource name to Schedule Todo and Scheduled Task reports	N/A
	Enhancement	PC CO Request, Potential & Package	Change 'title' to support up to 1000 characters	Table = ChangeOrder Request, ChangeOrder Potential, Change OrderPackage
	Enhancement	Prime Contract Line Item	Increase description field to 2000 characters	Table = ContractLine Item
	Enhancement	Work Order Contract	Added the following fields to the dataset: deleted_at, grand_total, origin_data, origin_code, origin_id, requisitions_are_enabled, and total_requisitions_amount. Added grand_total and total_requisitions_amount to 'Work Order Contract Summary' table.	Table = WorkOrder Contract
	Enhancement	Prime Contract	Added the following fields to the dataset: bill_to, budget_line_item_id, deleted_at, origin_data, origin_id, payment_terms, rejected_message, requisition_number ship_to, ship_via, original_substantial_completion_date, substantial_completion_date, and termination_date. Added start_date, original_substantial_completion_date and substantial_completion_date and termination_date to the 'Prime Contract Summary' table.	Table = WorkOrder Contract



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CBI Procore Financials	Feature	Budget Modifications	Added in budget modification dataset and related report	Table = BudgetModification
CBI Procore Project Management	Enhancement	Project Trending	Changed default date hierarchy for all charts	N/A
	Enhancement	Projects	Changed 'New Projects By Date' chart to show past 12 months of data.	N/A
	Bug Fix	Meetings	Changed the default end date in 'Meeting Date' to be the maximum meeting	N/A
	Enhancement	Meetings	Changed the 'Entries By Meeting Date' chart to show past 12 months of data. Also changed the default sort order of the 'Meeting Report' table to be on 'Meeting Date'.	N/A
	Bug Fix	Schedule Task Gantt and Schedule Task	Fixed count issue with 'Critical Path?' and 'Milestone?' pie charts.	N/A
	Enhancement	RFI Insights	Changed default date hierarchy for 'RFI Trending' chart. Changed chart to show % of grand total.	N/A
	Enhancement	Submittal Insights	Changed default date hierarchy for 'RFI Trending' chart. Changed chart to show % of grand total.	N/A
CBI Quality & Safety	Enhancement	Inspection Insights	Changed login on 'Avg Aging' to exclude inspections without an inspection date.	N/A
	Enhancement	Inspections	Added inspection item details and observations created from inspections to the integration and report.	Table = ChecklistItem, ChecklistItem Observation