Q1 2017 Release Notes

March 16, 2017

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Table of Contents

About the Q1 2017 Release 3
Your Opinion Matters 3
What's included in this Document 4
Release Note Change Log 4
Summary of Features and Impact to Users 4
Product Enhancements 5
Bulk Edit Project Fields 5
Applying Bulk Edit 5
Bid Scope Import – Map to Budget Line Item 6
Setup 6
Apply Bid Scope Import – Map to Budget Line Item in a Bid Package 7
Expanded Drag and Drop – Forms 9
Setup, Forms File Field 9
Fill out Form 9
Expanded Drag and Drop – Bid Submission 10
Setup - Bid Submission File Fields, Supporting Documentation 10
Bid Submission 11
Product Ideas Portal 12
Appendix A – Guide Me Retirement 13
Resolved Cases 14
Business Intelligence 14
Calendar 15
Cost 15
Documents 15
Processes 15
Schedule 16
Submittals 16
Time Tracking 17

About the Q1 2017 Release

e-Builder quarterly releases include improvements to a targeted area of the product and usability enhancements that increase the ease-of-use of current features and functions across the entire product. The latter is a culmination of user feedback and requests. In addition to enhancements, a list of resolved cases for the month is also enclosed.

Your Opinion Matters

We rely on your feedback to better serve you. If you have ideas about improving our product or service, please don't hesitate to let us know. Below are four ways to reach us.

- **Like/Dislike**

– Located in the banner of e-Builder Enterprise™ are like and dislike buttons. Click these to express your opinion of a particular page. This feedback is used to help prioritize upcoming product enhancements.
- **e-Builder Community** – The Ideas section of the e-Builder Community gives you a platform to share your thoughts on how to make e-Builder better. You can read and vote on the ideas of fellow e-Builder users or post your own. Those with the highest vote totals are noted when forming e-Builder's roadmap. To access the Community, click the arrow next to your username within the banner of e-Builder Enterprise, and then click eB Community.

- **Support** – Our Support staff is always available to meet your needs. To speak to a live customer service representative, call us within the U.S. at 888-288-5717 and outside of the U.S. at 800-580-9322, or email us at support@e-builder.net.
- **Annual Technology and User Conference** – The annual e-Builder Technology and User Conference offers a unique and up-close opportunity to gain insight into e-Builder product direction, learn best practices from industry professionals and peers, and to exchange information and ideas with members of the e-Builder community.

What's included in this Document

- A description of each product enhancement
- Guide Me retirement notice
- List of resolved cases, including new steps for adding photos to BI reports

Note: *The release is scheduled to be completed between the hours of 10pm EDT and midnight which will not impact system availability.*

Release Note Change Log

The release note change log includes all changes made to this version of the Release Notes document.

Date	Version Number	Description
March 7, 2017	1.0	Initial release
March 16, 2017	1.1	Includes resolved cases

Summary of Features and Impact to Users

Feature	Immediately Available No setup required	Setup Required
• **Bulk Edit Project Fields**		✓
• **Bid Scope Import – Map to Budget Line Item**		✓
• **Expanded Support for Drag and Drop File Upload** - **Bid Submission** - **Forms**		✓
• **Product Ideas Portal**	✓	

Product Enhancements

Bulk Edit Project Fields

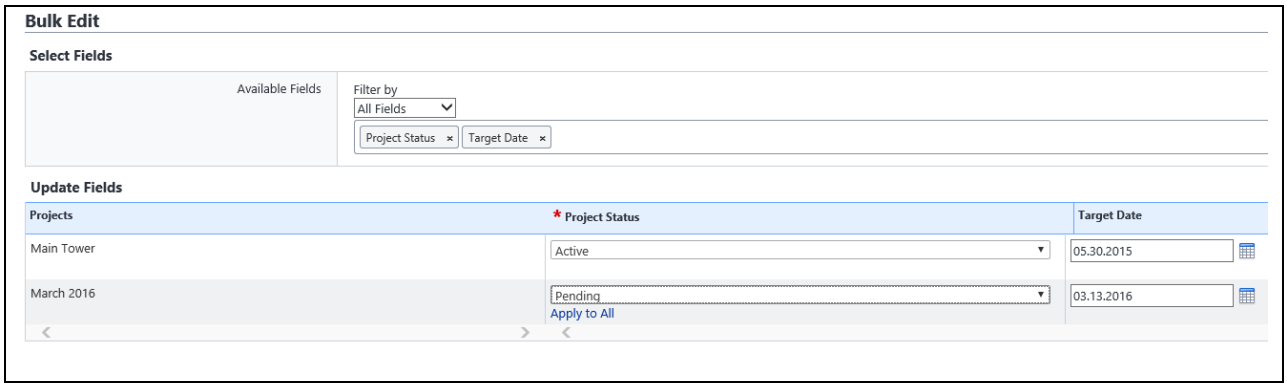
Making updates to project fields across many projects is now vastly more efficient. When you have a lot of updates to make, such as changing the Status or Target Date for multiple projects, it can be done at once in a bulk action. For example, update a custom field across 50 projects from the Project Details page with just a few clicks. The Bulk Edit capability is accessible anyplace you can edit projects.

Bulk Edit applies to updates of Project fields and Custom fields.

Permissions considerations: to perform Bulk Edits the user must have permission to update the field. The following permissions are validated:

- Add/edit project
- Custom field permissions

Upper Limits: Bulk Update enables updates across up to 50 projects for up to 25 fields at a time



Real World Scenario – Project Status Meeting Requires High Volume Updates

New information in a project status meeting require 50 projects to have their Status and Phase values updated in e-Builder. Rather than updating each project separately, which would take 4 clicks per project and potentially take more than an hour. With Bulk Edit, all 50 projects may be selected at once and the update take a matter of minutes.

Applying Bulk Edit

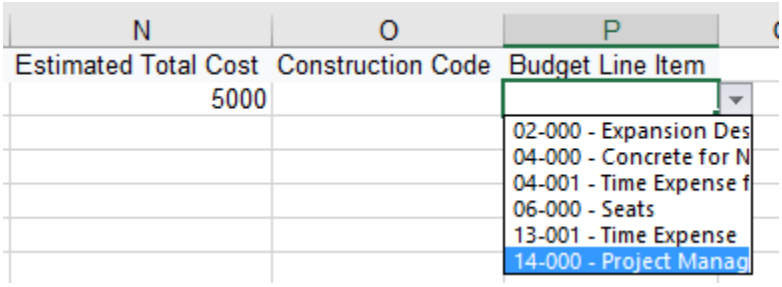
1. Access Bulk Edit from Administration Tools > Projects > Manage Projects, or by clicking the Projects tab to access the Projects page, or My Settings > Membership > Projects
2. Select the Projects to be updated by clicking the checkbox next to the project and click the Bulk Edit button. Note you may select up to 50 projects at a time.
3. Select the Fields to be updated utilizing the Available fields filter or typing the name of the field in the input box

4. Update the value of each field individually if the values are different or click Apply to All if the same field value applies across projects.
5. Click Save. A confirmation message will appear when updates are successful or a warning if one of the entries is invalid.

Bid Scope Import – Map to Budget Line Item

Did you know that Bid Scope items can be mapped to budget line items and commitments created from the awarded bid? It's called the Bid Award to Commitment process and it makes it easy to integrate Bids with the Cost module. Now that process is even more streamlined with the addition of budget line items to the Bid Scope Import.

Now you can associate bid scope items with budget line items from the beginning of the process, when importing the bid scope. When the commitment is generated from the awarded bid, the association between bid scope item and budget line item will already be in place.



Real World Scenario – High Volume of Bids

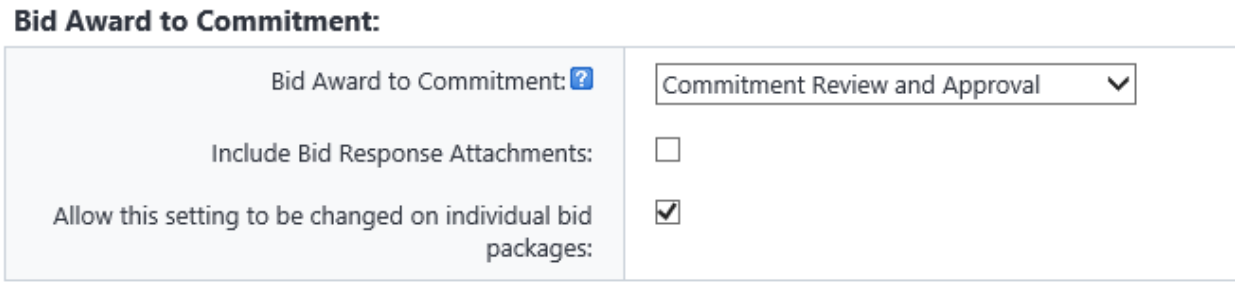
With 10 new projects approved and procurement engaged, a Bid Manager must create 10-plus bid packages in a compressed time period. To make the Bid Package creation and downstream award and commitment creation process as efficient as possible for the team, the Bid Manager imports the Bid Scope. As part of the Import a budget line item is associated with each bid scope item so that the budget line item is carried through automatically to the awarded commitment. Making the association up front can potentially save hundreds of clicks making this association manually later.

Setup

To set up the Bid Award to Commitment feature:

1. Bidding integration must be enabled within the cost module. This is already enabled in the e-Builder Beta account or your review purposes. To enable for your account contact e-Builder support (by toggling on the attribute cmEnableBidding for the account).
2. In e-Builder Administration tools turn on the Bid Award to Commitment feature. Select Administration Tools > Bidding > Options and choose the desired process in the Bid Award to

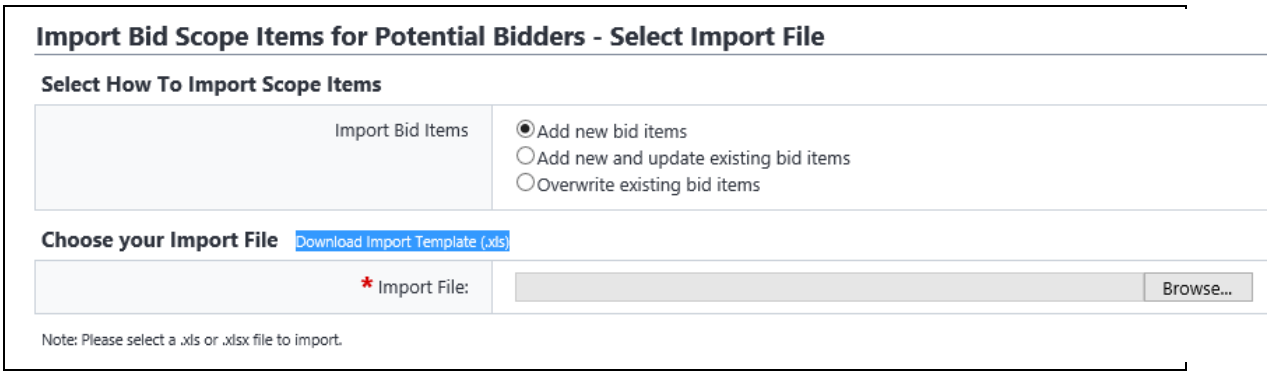
Commitment field. You may also allow this setting to be changes on individual bid packages by clicking the checkbox.



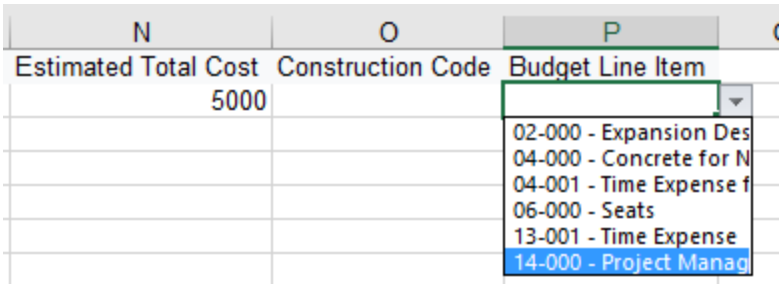
Apply Bid Scope Import – Map to Budget Line Item in a Bid Package

1. Select Bidding > Select the Desired Project
2. Select the desired package and select the Bid Scope Tab
3. Select Import Bid Scope

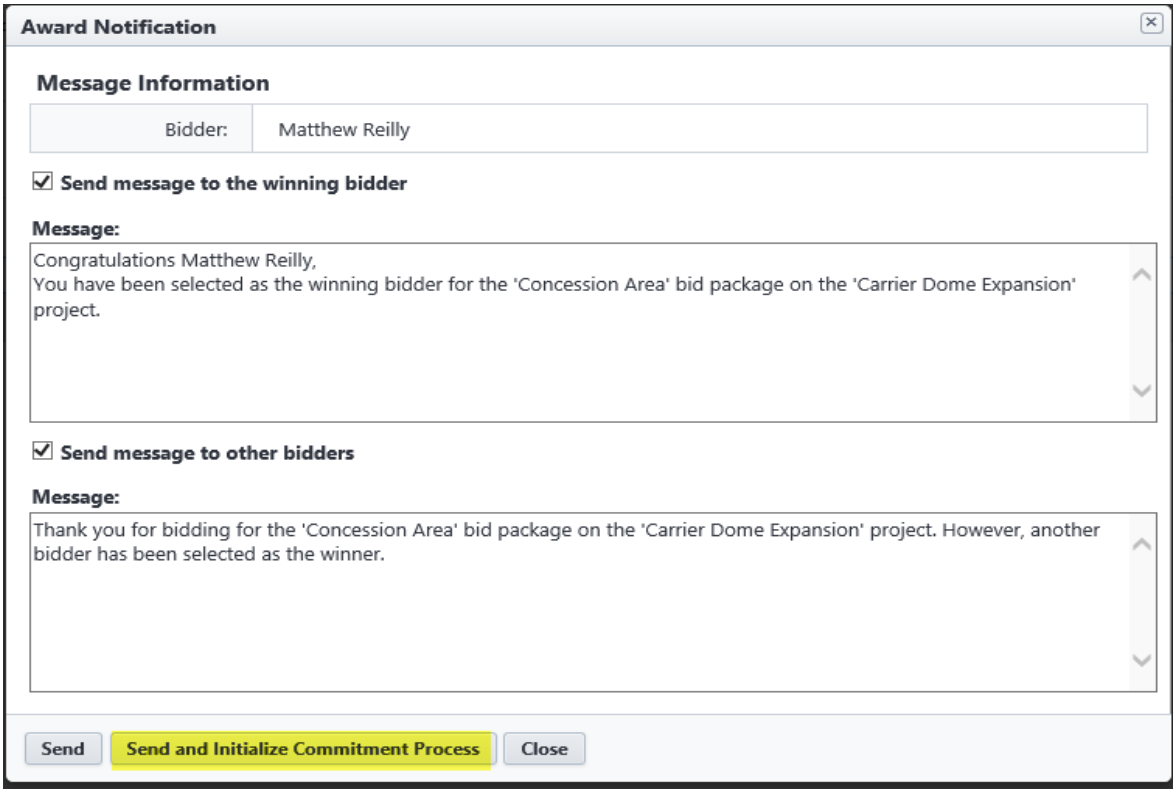
4. Select Add New Bid Items or the update or overwrite existing items option depending on your business need
5. Select Download Import Template



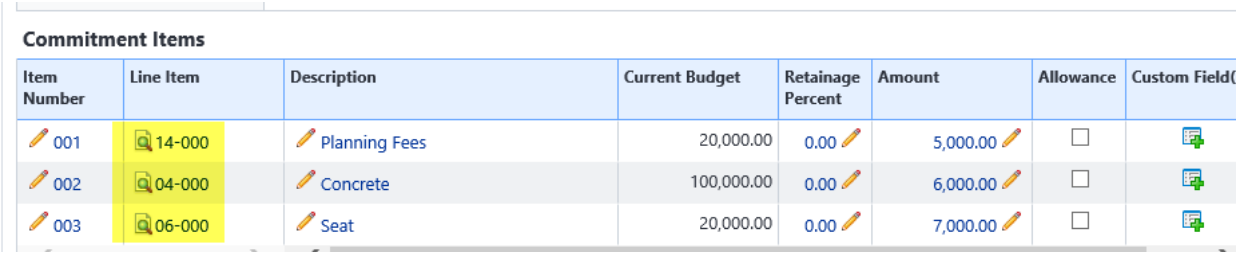
6. Populate the Budget Line Item field for each desired Bid Scope Item



7. Save and Import the file



8. When the Bid is Awarded and a Commitment Process is created through the Bid Award to Commitment Process, the Budget Line Item will be populated with the values populated in the import for each Bid Scope Item



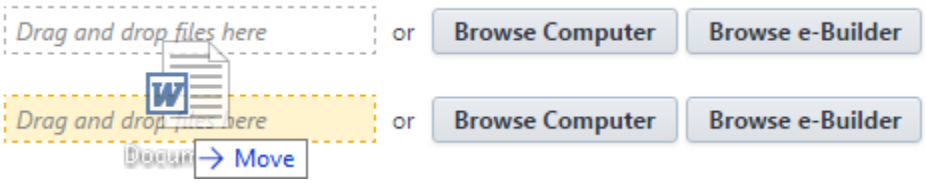
Expanded Drag and Drop – Forms

We've heard and acted upon feedback to further expand the use of file drag and drop to make document upload more efficient. Now Forms file fields and Bid Submission are added to the many areas where drag and drop is supported.

When multiple File Fields exist on a Form, it requires users to upload files to each File Field manually, which can be inefficient. In order to improve productivity, e-Builder added the ability to drag and drop files directly to a Form Field. In addition, this enhancement includes streamlining and reducing the number of clicks to complete a file upload.

This feature applies to:

- Forms, Add comment from public page - this page is displayed when requesting an external comment on a form. Enables drag and drop of files directly into the supporting documentation grid.
- Forms, File Fields - Enables drag and drop of files directly into the supporting documentation grid.



Real World Scenario – Contractor Required Documentation

An owner may require supporting documentation for Change Directives or other items that are tracked through a Form. On a large project, Contractors may be updating supporting documentation frequently. With drag and drop now supported, contractors and other form contributors save clicks and time.

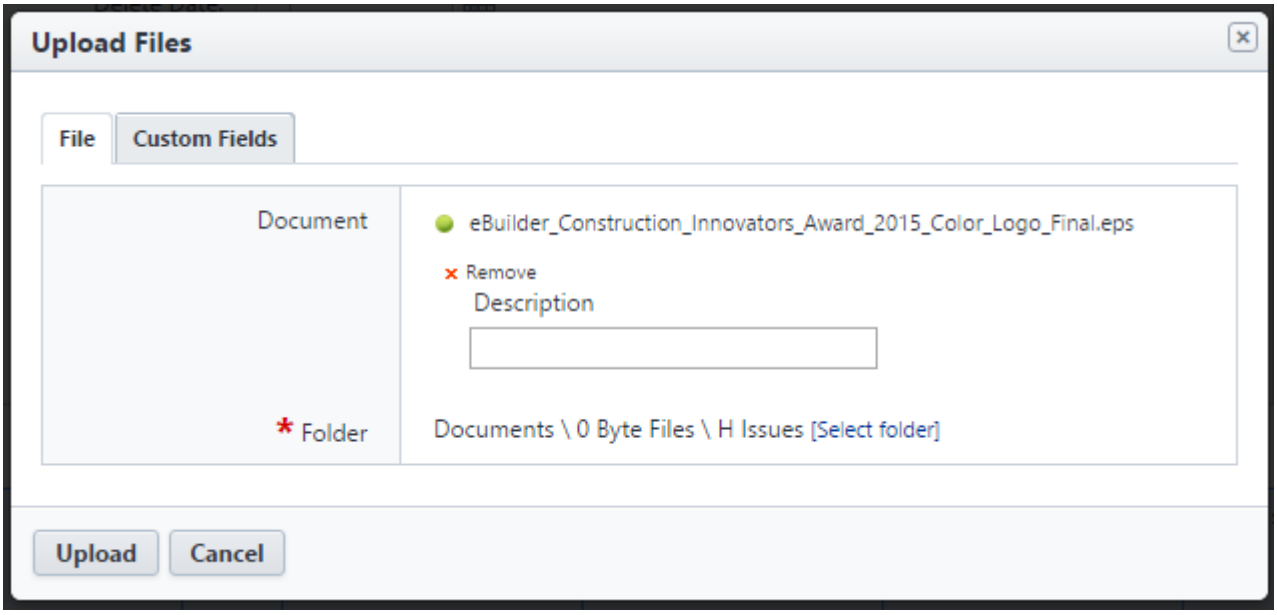
Setup, Forms File Field

1. Select Setup > Administration Tools > Forms > Manage Form Types
2. Edit a Form Type > Select Edit Fields
3. Click Add Field > Select the File Data Type
4. Follow Data Field wizard > Click Save

Fill out Form

1. Navigate to Projects > Select a Project
2. Select Forms > Fill Out Form > Select a Form with File Fields
3. Navigate to the File Field
4. Drag & drop a File into the File Field > Then the Upload Modal will open

5. Add the file description > Select a Folder > Update the File Custom Fields
6. Click Upload



Expanded Drag and Drop – Bid Submission

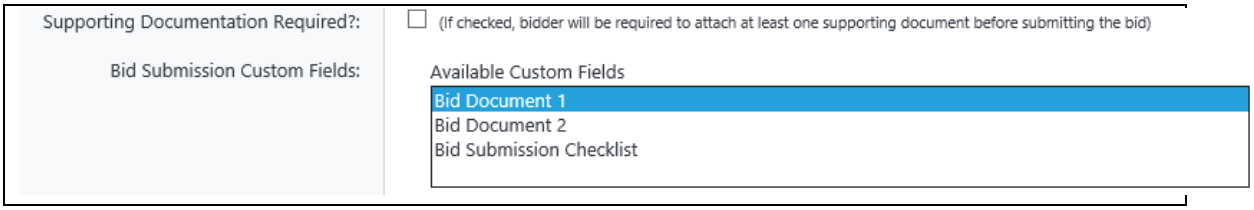
Document drag and drop is also expanded to make the bid submission process easier for invited bidders that are Submitting bids.

This feature applies to:

- Bid Submission, File fields – located on Bid Submission Custom fields tab. Enables drag and drop directly into file fields.
- Bid Submission, Supporting Documentation - Enables drag and drop of files directly into the supporting documentation grid.
- Bid Submission, Submit Quote page - Enables drag and drop of files directly into the Upload Bid Submission field

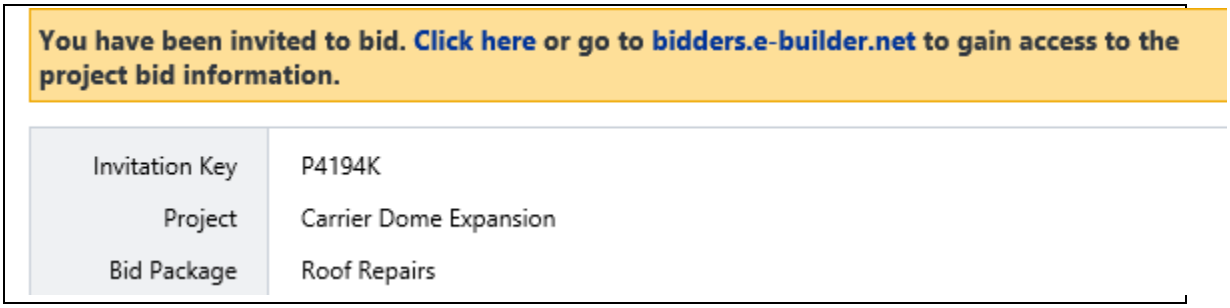
Setup - Bid Submission File Fields, Supporting Documentation

1. Select Bidding > Choose a Project > Add Bid Package
2. Fill out all required fields
3. Select Supporting Documentation Required
4. Add Bid Submission Custom Fields that are File Fields
5. Save Bid Package
6. Add Bid Scope
7. Invite Bidders



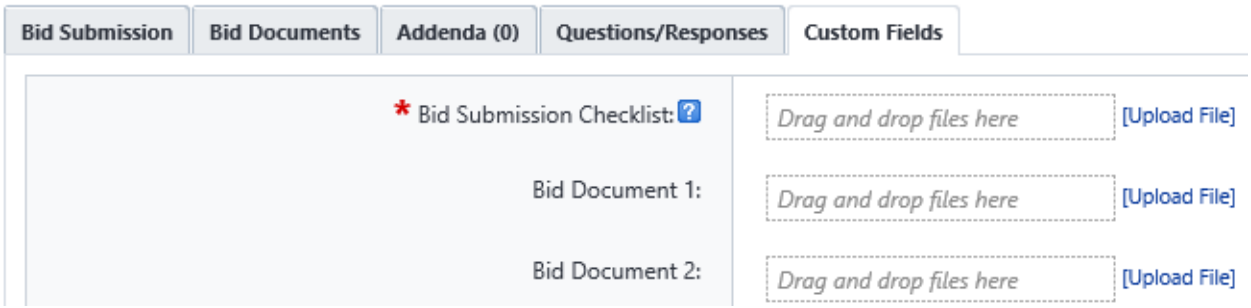
Bid Submission

1. Invited bidders may access the Bid Package by clicking the link in the Invitation Bid email and entering their Invitation Key

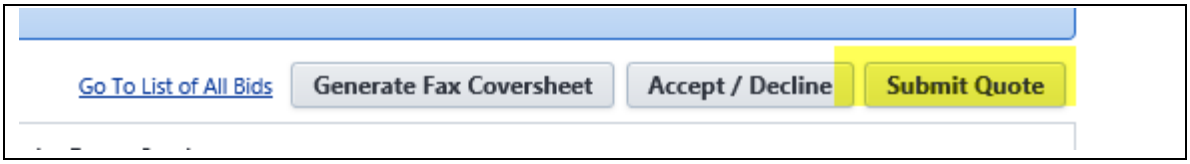


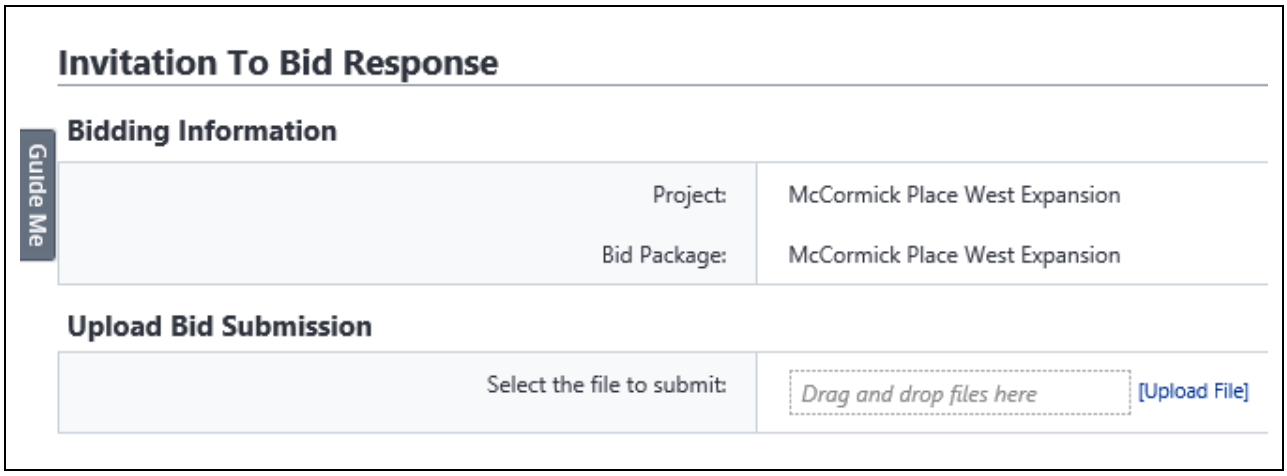
2. On the Bid Submission tab, scroll to the Supporting Documentation Tab. Drag and drop is enabled.

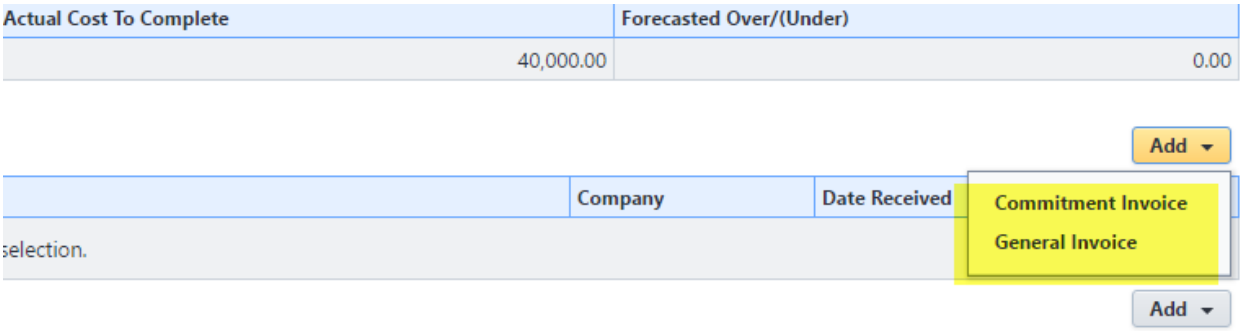
3. Select the Custom Fields tab. Drag and drop is enabled for File Fields.



4. Submit quote – Access an open bid as an Invitee and click the Submit quote button. The Upload Bid Submission field accommodates direct drag and drop of files.



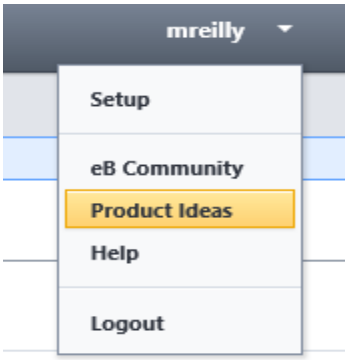


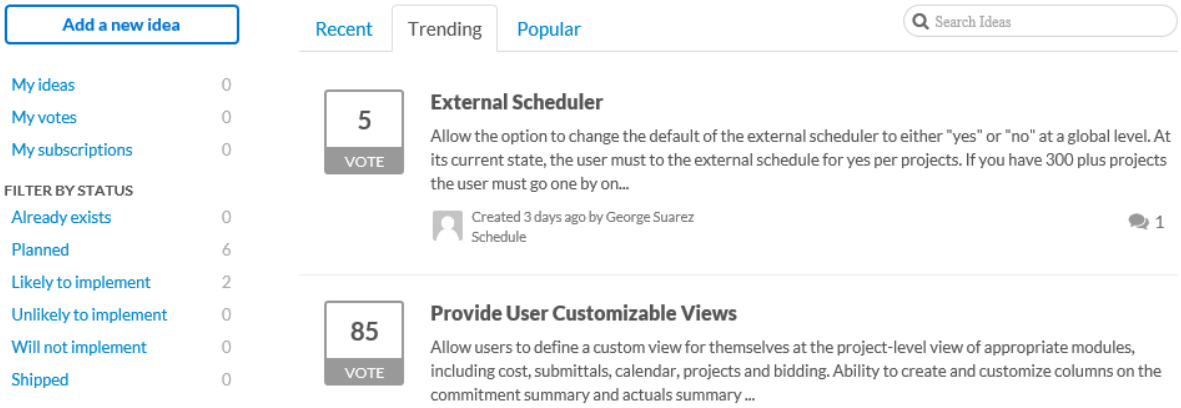


Product Ideas Portal

Have a product idea to share? A way to make your job easier or e-Builder easier to use? Now there's a new more robust way to submit product ideas. The Product Ideas portal makes it easy to submit an idea, view the ideas of your colleagues, and even vote on the ideas you think have the most benefit.

- To access the Idea Portal, click your profile username and select the Product Ideas link. Then click "Add Idea". We're listening!





Appendix A – Guide Me Retirement

With the Q1 Release, Guide Me will no longer be available and clients are encouraged to utilize Online Help and Resources in the Community for training material.

Why are we retiring this feature?

Removal of the Guide Me service is part of our effort to follow best practices for online training and assistance. The decision was informed by analysis of product usage information, listening to feedback shared via the Product Ideas portal , and conversations with customers.

What action do I need to take?

No action is required by administrators or end users to accommodate this change.

Resolved Cases

The following is a list of resolved cases for the month of August. If you have any questions regarding this maintenance release, please contact e-Builder Support at 888-288-5717 or via email at support@e-builder.net.

Module	Number of Resolved Cases
Business Intelligence	3
Calendar	1
Cost	3
Documents	1
Processes	5
Schedules	1
Submittals	1
Time Tracking	2

Business Intelligence

Case Number: 00204564

ERROR WHEN RUNNING A BI PROCESS REPORT

When running a Standard BI report with Process Summary data the Date Due column generated an error. The issue is corrected so there will not be an error while running the BI report.

Case Number: 00198593

PHOTO ERROR ON BI REPORT OUTPUT

Reports with progress photos were failing when exporting to PDF. After a data and code fix, now reports can be exported to any format and the images are shown correctly.

There has been a change of steps for adding progress photos to a report, as follows:

1 - Select the cell and click in the Formula Editor

2 - Select Load Image in Other and click Add

3 - Select the Image field from left panel and click Add and then OK

BI REPORT TIME STAMP SHOWS INCORRECT TIME ZONE STAMPING

All BI reports were running using the server time zone. Now BI reports are executed using the current user time zone.

Calendar

Case Number: 00209383

ERROR WHEN ADDING EXTERNAL USER

Adding an external attendee to an event caused the current attendees of the event to be deleted. Now the external attendee can be added without deleting the current attendees.

Cost

Case Number: 00206210

BUDGET AMOUNT ON FORECAST SCREEN DOUBLE ACTUAL VALUE

Cost Summary Snapshot values were generating doubled values in Forecasts. Now the forecasts can be created without doubled values.

Case Number: 00204013

EXCEPTION: "INVALID PROJECT COMPANY NAME"

Performing cost imports that mapped a value to a company on project custom field might fail if the company was included in multiple projects. Now, assigning a value to a company on project custom field during an import will correctly identify the project and not error.

Case Number: 0020083

STATUS IN COST MODULE NOT UPDATING

There was an issue with the total amounts not being calculated correctly. A data fix was completed to address the issue.

Documents

Case Number: 00203863

ERROR MESSAGE WHEN DRAGGING MULTIPLE FILES FOR UPLOAD

An error displayed in some instances depending o how the file was saved and formatted. This case has been identified and accounted for so files will no longer have issues uploading.

Processes

Case Number: 00210937

ERROR USING STAMP

Previously, clicking on 'Save as New document' after dragging the stamp onto the document caused the page to render a blank document without any content. Now the issue is addressed so that the document is properly displayed and the stamps are saved without issue.

Case Number: 00200242

INTEGRATION IMPORT PERIODICALLY FAILS

When importing invoices, if any trigger a workflow exception for invalid status or cost violation, the system displayed a generic error with no relevant info on it. Now, if this occurs the system shows more detailed and relevant error text.

Case Number: 00205559

MASTER COMMITMENT CHANGE GLOBAL CUSTOM FIELDS BEING CLEARED

When a process moves from one step to another, in some instances master commitment change custom fields were not properly saved. The issue is addressed and the information is properly saved.

Case Number: 00204186

DATA ASSIGNMENTS INCLUDING EXTRA STRING VALUES IN THE ASSIGNMENT

When an assignment expression consisted of either dropdown or multi-picklist data field values a validation error was returned upon saving the expression. Now the issue is addressed and saving the expression functions as expected.

Case Number: 00204004

GENERAL INVOICE IMPORT ISSUE

Importing general invoices via the Data Entry page could fail in some instances and the e-Builder error page would be displayed. Now, the import functions as expected.

Schedule

Case Number: 00209134

ALLOWED DATE RANGES EXPANDED

There was a restriction on the dates allowed for calendar entry where the oldest year was restricted to 1980. This has been expanded to allow dates back to 1900 to accommodate historical data.

Submittals

Case Number: 00209097

ERROR IN VERSION SEQUENCE NUMBERS

Previously there were issues where revision numbers may have been skipped. This issue has been corrected.

Time Tracking

Case Number: 00206074

DUPLICATE TIMESHEET

Timesheets submitted appeared to be submitted twice, but once approved showed up only as one. This issue has been corrected.

Case Number: 00209115

RANDOM TIMESHEET ERROR RELATED TO SAVE

There was an issue upon save when editing timesheet rows in certain instances. The issue has been corrected.