



Q4 2016 Release Notes



December 15, 2016

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Table of Contents

- About the Q4 2016 Release 4
 - Your Opinion Matters 4
 - What’s included in this Document 5
 - Release Note Change Log 5
 - Summary of Features and Impact to Users..... 5
- Product Enhancements..... 6
 - Groups..... 6
 - Process File Upload..... 7
 - Documents: Copy File Options 8
 - Hide Funding 8
 - Display Timestamp for Comments 9
 - Lock Bid Tabulation Export..... 9
 - Redline Tool Update: Document Conversion..... 10
 - Funding Transaction Custom Fields..... 11
- Edit Documents in Place: Support for Macro enabled files 12
 - Interface Improvements 13
- Product Ideas Portal 14
 - Appendix A – Redline Tool Feature Updates..... 15
- Summary 15
- Most Common Tasks 16
- Discontinued Features 16
- Relocated Features..... 16
- Resolved Cases..... 19
 - Cost..... 19
 - Forms..... 20
 - Mobile App..... 20
 - Processes/Workflow..... 20
 - Projects 21
 - User Setup..... 21
- Appendix B - Implementation Guide 22
 - Groups 22


Setup	22
Apply Group	23
Process File Field Upload	23
Setup	23
Start/Edit Process	24
Copy File Options.....	24
Copy file(s).....	25
Hide Funding on a Process Layout.....	25
Setup	26
Start/Edit Process	26
Failed Funding Scenario	27
Display timestamp for Comments.....	27
Add Comment Example	27
Lock Bid Tabulation Export	28
Setup	28
Export.....	28
Redline Tool Update	29
Setup	29
Documents	29
Funding Transaction Custom Fields.....	29
Setup	30
Funding Transaction	30
Edit Documents in Place: Support for Macro enabled files	31
Update Commitment Custom Fields from Cost Processes	31
Setup	31
Interface Improvements: Button Text Simplified.....	32

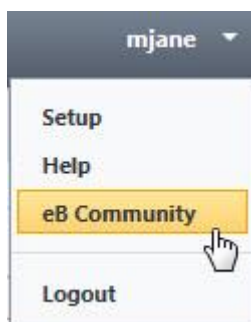
About the Q4 2016 Release

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
- Appendix of Redline Tool feature updates
- A list of resolved issues

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
November 28, 2016	1.0	Initial release
December 15, 2016	1.1	Added resolved issues

Summary of Features and Impact to Users

Feature	Immediately Available No setup required	Setup Required
• Groups		✓
• Process file field upload		✓
• Copy file options	✓	
• Hide Funding on Process Layout		✓
• Display timestamp for Submittal Comments	✓	
• Lock Bid Tabulation Export		✓
• Redline Tool Update	✓	
• Funding Transaction Custom fields		✓
• Edit Documents in Place: Support for Macro enabled files	✓	
• Commitment Custom Fields: Data Assignments		✓
• Interface Improvements	✓	
• Product Ideas Portal	✓	

Product Enhancements

Groups

Create a distribution list of users and contacts. Save time when you are cc'ing the same recipients over and over on messages and better ensure the right people are kept informed on project activities. Note all users may create a Group, admins have an additional ability to make a group available to all users or available on a particular project.

- Any user can create a group that only they can see
- Admins can make a Group available to all users, and to one or all projects
- Groups may be applied in the areas below:

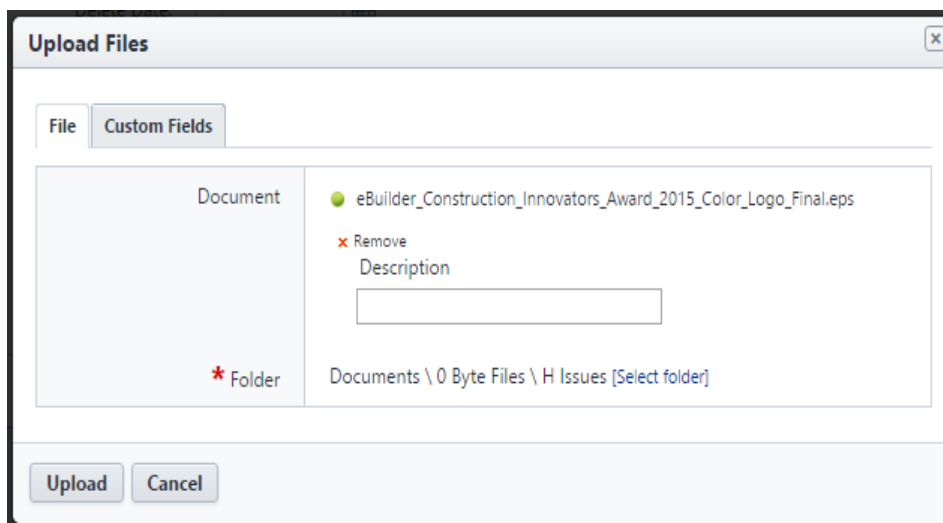
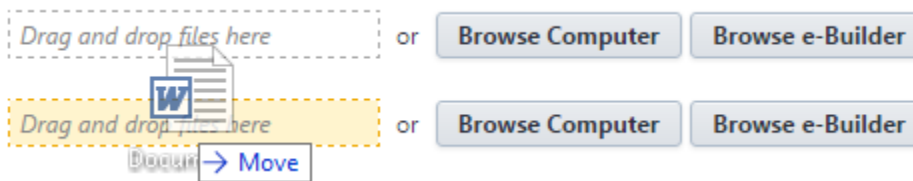
Message Type	Area
Submittals, Send to Contractor	cc External users
Submittals, Forward for Review	cc External Users
Submittals, Send for Review	cc External Users
Submittals, Forward Submittal Item	Send To of Enter External User, cc External Users
Documents	cc: box of Send File(s), and Email URL messages

Projects	cc box of Email Users
Calendar	Add Attendee on Event Details page
Reports	Send Reports
Processes	Request Comment, Process Instance
Forms	Send Meeting Minutes
Schedule	Add External Users on Send Schedule
Mange Users	Send Email cc

Process File Upload

We've introduced a new ability to drag and drop files directly to a File Field. Save time when uploading multiple file fields exist in a process. This enhancement also streamlines and reduces the number of clicks needed to complete a file upload.

- Add a File Data field in a process and drag and drop will automatically be available
- Custom fields are now located in their own tab, simplifying the user experience



Documents: Copy File Options

There is new flexibility when copying files. When a file with the same name exists in the folder you are copying to, you may either keep both copies but rename the latest or apply as a new version.

- No setup required on the part of client or services team
- When destination folder contains file with same name the new options appear

Copy file(s)

The following file(s) already exist in the destination folder

Aloha Meeting Type_123462.doc

Copy, but keep both files
The file(s) you are copying will be renamed to match the following example: "filename (1).docx" All previous versions will be renamed.

Copy and append the latest version to existing file
This option copies the most recent version of the file(s) to the destination folder as a new version of the existing file(s).

Hide Funding

If you have contractors submitting invoices or other cost processes, we're providing a new ability to hide Funding information from the process layouts they access. Enables greater privacy and reduced errors by restricting the ability to view and manage funding from cost processes like invoices from those who have no business need to see or edit it.

Commitment Items							Manage Funding
Item Number	Line Item	Description	Current Budget	Funding Rule	Retainage Percent	Amount	Allow
001	10*3.ABC	test	11,004.00	Chris & Rule	0.00	0.00	<input type="checkbox"/>
Total			11,004.00			0.00	

Edit Section Fields

Section Field Properties

Field Name	Read-Only	Required
Commitment Invoice	<input type="checkbox"/>	<input type="checkbox"/>
Manage	<input type="checkbox"/>	<input type="checkbox"/>
Restrict users from seeing & modifying funding rule per line items	<input type="checkbox"/>	<input type="checkbox"/>

This setting hides the ability to Manage Funding and restricts users from modifying the Funding Rule per line item.

Save Cancel

Display Timestamp for Comments

More easily determine the order in which comments are made throughout the day with a new timestamp for comments. No setup needed.

Comment timestamps are now available in the following areas:

- Schedule – Activity View and Details
- Submittals – Item Details, Package Details

Private	In Review	Comment
<input checked="" type="checkbox"/>		<p>John Smith, <i>Bright Construction</i>, 11.08.2016 01:55 PM</p> <p>120 volt or 24 volt is acceptable. Subcontractor shall coordinate with per contract</p> <p>[Make Public] Hidden from Review [Show]</p>

Lock Bid Tabulation Export

Enables your organization to lock the bid tabulation spreadsheet upon Export. Assists in meeting internal audit requirements and ensure bid information is not manipulated without an audit trail.

- Those who receive the spreadsheet will be able to view, but not edit the contents.

Home Dashboard Projects Planning Forms Processes Documents Calendar Contacts Bidding Cost Schedule Reports Time Tracking

Options

Bid Options:

Delivery Method:

- Deliver via e-mail if contact has one, else fax
- Deliver via fax if contact has one, else e-mail
- Deliver via both e-mail and fax if the contact has them

Project Contacts:

- Automatically add all invited bidder contacts and companies to project contacts
- Automatically add only awarded bidder contacts and companies to project contacts
- Do not automatically add bidder companies and contacts to project contacts

Require Password to Open Bid Tabulation:

Required # of Users That Must Witness Sealed Bid Openings: 0

Allow Bid Tabulation To Be Opened Prior To Bid Due Date:

Lock Bid Tabulation Excel Export File: Prevent unwanted changes to excel worksheet

Enable Electronic Bid Submission:

Redline Tool Update: Document Conversion

As a follow up to the release of an updated version of the redline tool earlier this year, we've migrated existing redlines to a new format that works with the updated version of the tool. As a reminder, the updated tool:

- Works across all supported browsers (IE 11 and above, Chrome, Firefox, Safari)
- No Active X plug in needed
- Immediately available, no setup required

Important note: For more information on the feature differences between the previous version of the Redline Tool and the new version, see the Redline Tool Updates - **Appendix A** of this document.

HTML DWG Viewer - Google Chrome

https://qa3.e-builder.net/da2/documents/fileviewdwg_html.aspx?FileID=28080eea-dc27

Annotate Review Redact Publish

Funding Transaction Custom Fields

In instances when your organization needs to track detailed information about funding transactions, such as funding accounts in external systems, new Account Funding Transaction custom fields are available.

- Track detailed information about funding transactions
- Add to Funding Adjustments to include details (e.g. source account of added funds)
- Once setup these fields are available in Funding Source details pages, Budget Change funding process, oData and Reports that show each line as a transaction

Funding Transaction Custom Fields For: ◀ **Bond 2**

Funding Transaction Details

Description:	Bond 2
Amount:	100,000.00

Funding Transaction Custom Fields

Funding Txn Source Account:	cde123
-----------------------------	--------

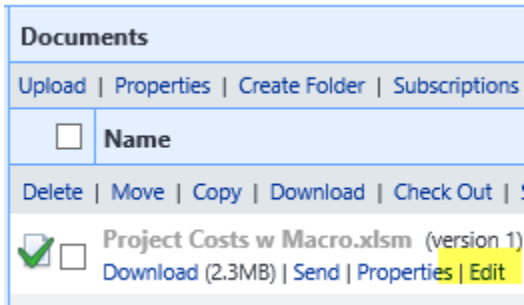
Funding Transaction Custom Fields

	Label	Variable Name
Edit Delete	Funding Txn Source Account	Custom_Funding_Txn_Source_Account

Edit Documents in Place: Support for Macro enabled files

Now macro-enabled files are supported with the Edit Documents in Place feature. Excel, Word and PowerPoint files of type .xlsm, .pptm and .docm are covered. Macro enable file types are typically leveraged for their advanced automation capabilities.

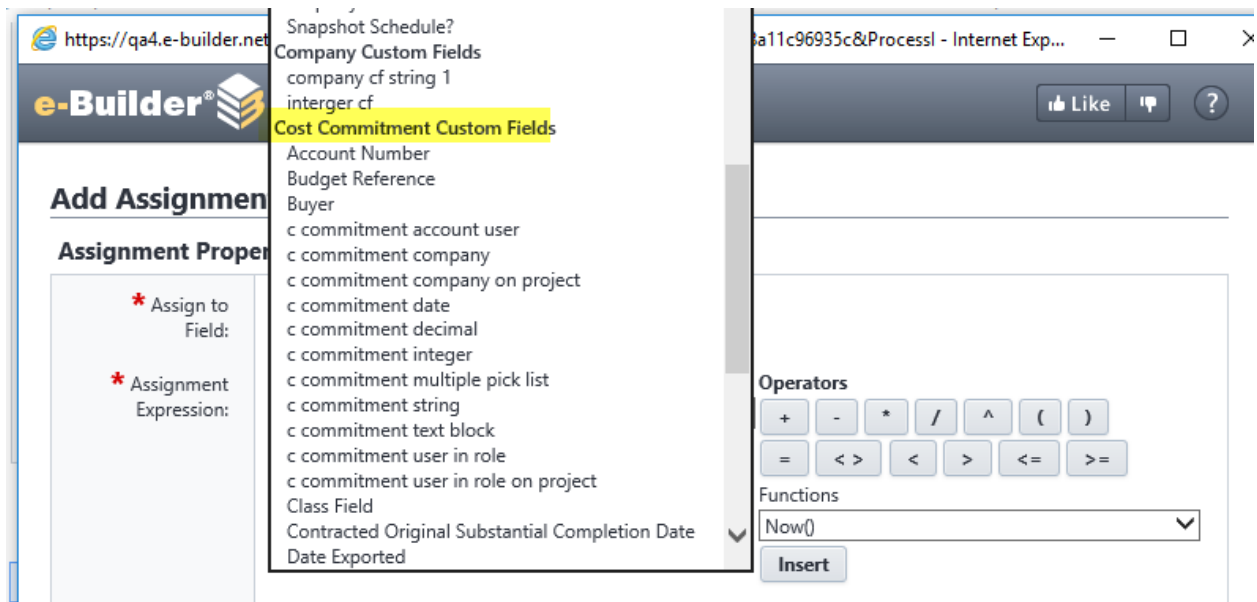
- Excel, Word and PowerPoint files of type .xlsm, .pptm and .docm are covered
- No setup needed



Commitment Custom Fields: Data Assignment

We're providing a new ability to make commitment custom fields available to other cost processes. For example, if your organization tracks insurance policy dates or other data points at the commitment level, you could now make those data elements available to a Commitment Change process through data field assignments.

- Commitment Custom fields are now available to Commitment Change, Invoice, and Dynamic processes.
- Use data field assignments to carry the information your team needs forward and avoid duplicate entry



Interface Improvements

We continue to make interface improvements to make e-Builder easier to use. This release we've simplified the text in buttons throughout the application to make them easier to read and understand. We've also streamlined the process for starting invoices, eliminating clicks.

Button text update

The updated text states the action associated with clicking the button and eliminates redundant verbiage that is repeated in other areas of the page. For example, we've updated button text in the below areas, but you'll see this simplified button text approach in many other areas in e-Builder.

- Budget Line items - 'Add Line Item' to 'Add'
- Budget changes - 'Add Change' to 'Add'
- Notes - 'Add Note' to 'Add'
- Documents - 'Attached Documents' to 'Attach'
- Forms – 'Attach Forms' to 'Attach'
- Processes – 'Attach Processes' to Attach

Apply Template Add

15 items in 1 pages

Projected Changes	Projected Budget
0.00	124.00
0.00	1,002.00

Start Invoice - Streamlined

Extra clicks have been removed from the process for starting an invoice. Now the Add Invoice button provides a dropdown choice to let the user select either a Commitment or General Invoice. Previously this selection was made after navigating to another page.

Actual Cost To Complete	Forecasted Over/(Under)
40,000.00	0.00

Company	Date Received
selection.	

Add ▼

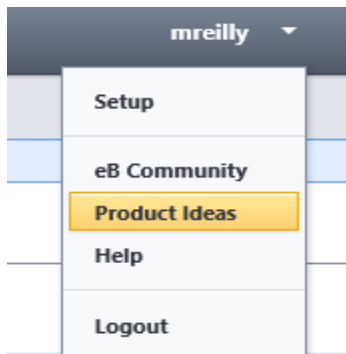
Commitment Invoice
General Invoice

Add ▼

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!



Add a new idea

Recent
Trending
Popular

Q Search Ideas

My ideas 0

My votes 0

My subscriptions 0

FILTER BY STATUS

Already exists 0

Planned 6

Likely to implement 2

Unlikely to implement 0

Will not implement 0

Shipped 0

5

External Scheduler

Allow the option to change the default of the external scheduler to either "yes" or "no" at a global level. At its current state, the user must to the external schedule for yes per projects. If you have 300 plus projects the user must go one by on...

Created 3 days ago by George Suarez

Schedule 1

85

Provide User Customizable Views

Allow users to define a custom view for themselves at the project-level view of appropriate modules, including cost, submittals, calendar, projects and bidding. Ability to create and customize columns on the commitment summary and actuals summary ...

Appendix A – Redline Tool Feature Updates

Summary

An Active X plug-in is no longer required to use the redline tool and the Viewer is now compatible with all e-Builder supported browsers, not just Internet Explorer. The interface has an updated look and feel. Most of the previously available functions are still available with a few exceptions (See the [Discontinued](#) and [New Features](#) sections). Similar controls in the Top Navigation menu have been collapsed into drop-down menu and others relocated.

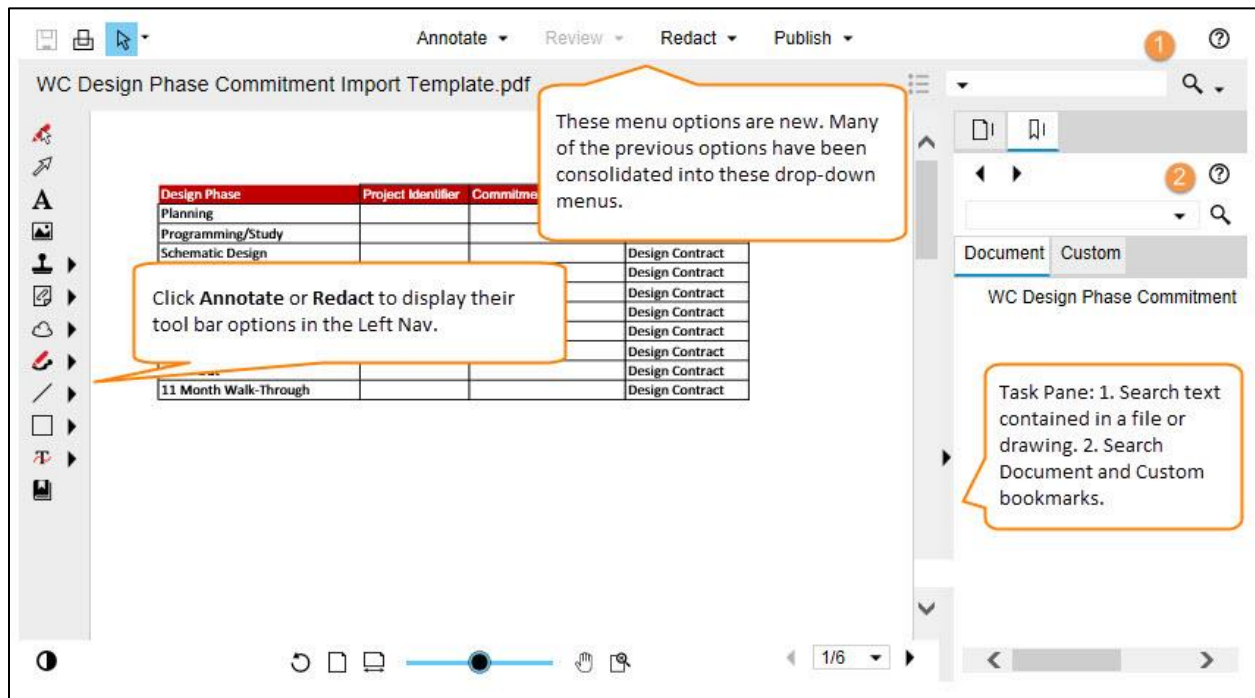



Figure 1: Overview of Redline Interface

Most Common Tasks

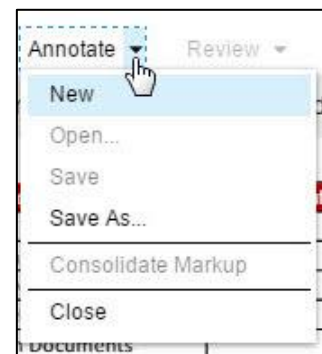
Users may be looking for options that they are used to and may need assistance finding them if they've been relocated.

- **Add New Markup** – Now located in **Annotate** Menu. Choosing this option opens the markup toolbar on the left just as before. (see Figure 1).
- **Open Existing** – Now located in Annotate Menu.
- **Rotate** – Replaced by the Rotate icon. Still located in Bottom Navigation toolbar.
- **Show Layers** () – This icon is now only visible for images that have layers and is still located in the Bottom Navigation toolbar.

Discontinued Features

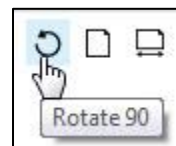
The following features have been discontinued. They are not available in this version of the tool:

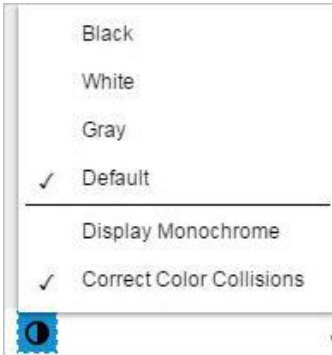
- **Arc** –The arc tool was located in the Line menu on the Left Nav and it allowed you to create an arc shaped line to highlight and annotate.
- **Measure** –The measure tool was located in the Top Navigation toolbar and it allowed you to measure distances between points in a file or drawing.
- **Polycloud** – This was an option in the Cloud menu located on the Left Nav and it allowed you to create a polycloud image to highlight and annotate.
- **Publish** – The options to publish CSF and JPG are no longer available, but you can still publish to PDF & TIF.



Relocated Features

- **Display Monochrome** – *Note: Feature not supported in browsers IE 11, Safari 6 and under.* This is no longer its own icon, but is now an option in the Background color menu and is still located in the Bottom Navigation toolbar.





- **Redact** – This option used to be in the Left Nav., but is now its own menu option in the Top Navigation toolbar.

- **Zoom (Options)** – Moved from the Top Nav. to the Bottom Navigation toolbar.



- **Bookmarks** – Used to be accessible from the Task Pane and is now located in the Left Navigation menu after clicking Annotate.

New Features

- **Pointer** – Is now a drop-down menu that includes **Cursor** and **Region** (new).



- Cursor – Allows you to make a screen selection, same as before.
- Region – New option. Allows you to select a region of text to copy.



- **Stamp Tool** – This is a new feature added to the Left Navigation menu. You can add stamps, signatures and symbols.



- **Text** – This is a new menu option located on the Left Nav. that allows you to manipulate text contained in the file or drawing (strikeout, strikethrough, highlight, underline)

- **Bookmark** – This is a new option located in the Left Nav. that allows you to add custom bookmarks. These can be reviewed and searched from the Task Pane.



- **Changemark** – This used to be a single Changemark icon. Additional options have been added (strikethrough, highlight, cloud arrow, checkview).



- **Cloud** – A highlight option has been added to this menu.

Resolved Cases

The following is a list of resolved cases for the month of December. 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
Cost	6
Forms	1
Mobile	1
Processes	8
Projects	2
Setup Admin	1

Cost

Case Number: 183100

Previously when editing a commitment change with additional scope items an error occurred. Now the edit process functions as expected.

Case Number: 194016

Previously, when creating a new master invoice in received status with all \$0 line items, if amounts were added to the items later, the "Actuals Received" on the corresponding project commitments would not be updated. This allowed invalid commitment changes against them after funds were already allocated. Now, the "Actuals Received" column will be properly updated when the item amounts on the master invoice are updated.

Case Number: 199527

Previously Payapp Imports required clients to calculate "Amount this Period" & "Quantity this Period" based on unit cost. Now the import logic is the same as the user interface and does not require clients to calculate "Amount this Period" & "Quantity this Period" based on unit cost.

Case Number: 201666

Previously an error existed in the Projected Commitment Calculation. Now the correct values are returned.

Case Number: 202640

Previously an error was returned when saving general invoices where the date due was set. Now the invoice will save successfully.

Case Number: 202718

Previously when saving general invoices, an error was returned if the setup option was selected to save the contact to the project contacts but they weren't yet a member of the project contacts. Now the invoice will save successfully.

Forms

Case Number: 185421

Previously Form Fields were displayed Out of Order in error. Now, the information on the form displays correctly.

Mobile App

Case Number: 193131

Previously forwarding a form in the mobile app would return an error. Now the forwarding is successfully completed.

Processes/Workflow

Case Number: 199363

Previously all commitment change processes that were spawned with the Copy Cost Data option enabled created new scope items for every item on the parent commitment change regardless if the parent commitment change items were linked to existing commitment items. Now, a setting has been added to the Copy Cost Data setting for commitment change processes to allow the functionality to maintain the relationship to existing commitment items when spawning the child process.

Case Number: 182650

Previously an error was returned when trying to edit a process view. Now the process view may be edited and saved as expected.

Case Number: 195911

Previously an error was returned when creating Process Report formulas. Now the error is resolved. As part of the resolution the Activity Description was added to the drop down list in the formula builder.

Case Number: 198041

Previously PDF Mail merges that include merge codes to list the time were displaying the time in UTC. Now, time merge codes are properly handled to convert the merge code's result to the user's specific time zone.

Case Number: 198600

Previously an error returned when editing invoice line item quantities. Now the edit functionality may be utilized without error.

Case Number: 201418

Previously when filtering for processes on public list processes page, if the grid was sorted by Process Prefix Counter, clicking the Filter button would result in an error. Now, clicking the Filter button in this scenario will properly show the results in the grid without error.

Case Number: 202615

Previously Dynamic commitment line item processes that had read-only subjects were unable to be saved as draft or submitted. Now, dynamic commitment line item processes with read-only subjects are working as expected.

Case Number: 203187

Previously when setting the value for a user or company lookup custom field when it didn't previously have a value, the save returned an error. Now the save completes successfully.

Projects

Case Number: 200416, 00200219

Previously event handlers with exceptions slowed other event queue items from being processed. Now, any events with exceptions will be automatically retried to improve queue processing.

User Setup

Case Number: 197375

Previously, Project Membership and "projects that user is a member of" in the manage membership page displayed incorrect data in some instances. Now the data is returned correctly.

Appendix B - Implementation Guide

This document contains procedural instructions for the implementation and use of the new features released in e-Builder's Q4 2016 Product Release.

Groups

A Distribution List of users and contacts that can be used when cc'ing people on messages in many areas of e-Builder (see table below for complete list). Save time when you are cc'ing the same recipients over and over on messages and better ensure the right people are kept informed on project activities. Note all users may create a Group, admins have an additional ability to make a group available to all users or available on a particular project.

The screenshot shows the 'Add Group' form in the e-Builder application. The form is titled 'Add Group' and is located under the 'Contacts' menu. It contains several input fields: 'Choose Name' with the value 'Smith Tower Team', 'Group ID' with the value 'SmithTowerTeam', 'Description' with the value 'Architects and Engineers', 'Available' with a dropdown menu set to 'Pilot Build', 'Privacy' with radio buttons for 'Only Me' (selected) and 'All Users', and 'Add Members' with a 'Filter by' dropdown set to 'All' and a search box containing '<qatest@e-builder.net>'. A 'Lookup' button is next to the search box. The top navigation bar includes tabs for Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, Time Tracking, Setup, and a plus sign.

Setup

1. Select Contacts > Groups > Add Group
2. Populate all required fields (Name, Group ID)
3. Add members to the Group (note that members must be a user or contact to be added to a Group)
4. Admins may make the Group available to all users or themselves only
5. Admins may make group available to all projects or a particular project
6. Click Save

Apply Group

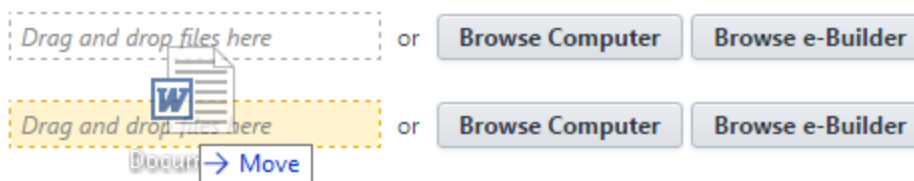
1. Navigate to Submittals, and to one of the message types in the below table, for example Send for Review
2. Choose a project > Select Submittals > Submittals Register
3. Select one or more Packages and click Send for Review
4. In the CC External Users Box type the name of the desired Group
5. Select the Group
6. Click Send for Review

CC External Users Via
Email

Message Type	Area
Submittals, Send to Contractor	cc External users box
Submittals, Forward for Review	cc External Users
Submittals, Send for Review	cc External Users
Submittals, Forward Submittal Item	Send To of Enter External User, cc External Users
Documents	cc: box of Send File(s), and Email URL messages
Projects	cc box of Email Users
Calendar	Add Attendee on Event Details page
Reports	Send Reports
Processes	Request Comment, Process Instance
Forms	Send Meeting Minutes
Schedule	Add External Users on Send Schedule
Mange Users	Send Email cc

Process File Field Upload

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



Setup

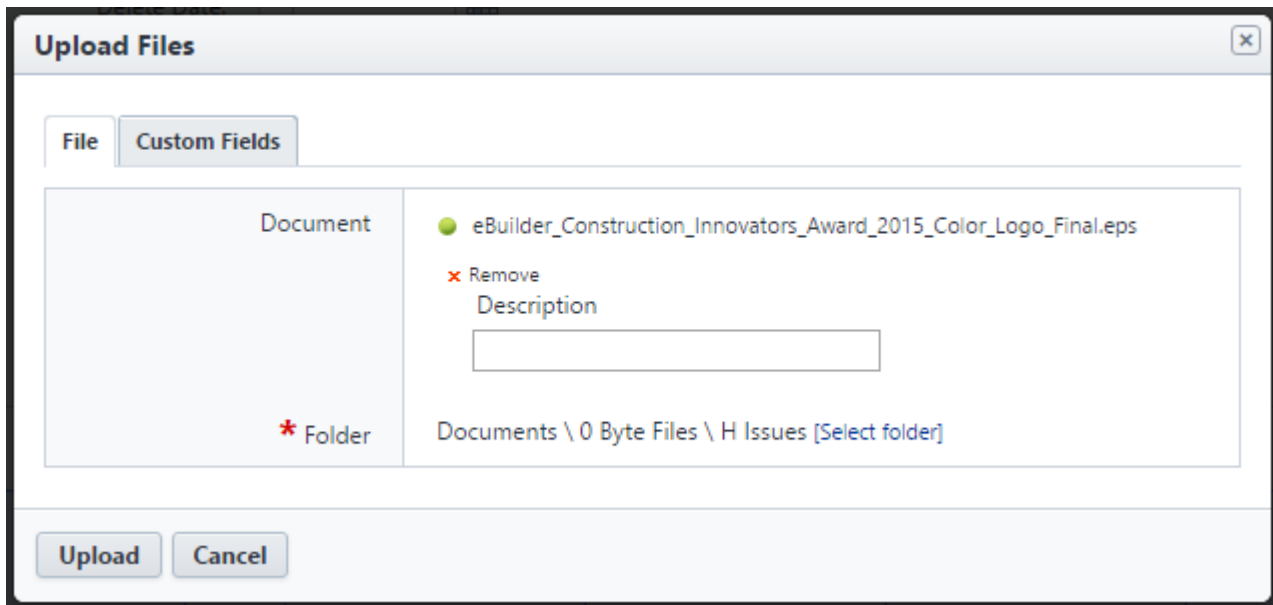
1. Select Setup > Administration Tools > Processes > Manage Processes
2. Start or Edit a Process > Select the Data tab
3. Click Add Field > Select the File Data Type
4. Follow Data Field wizard > Click Save
5. Select Page Layouts tab > Add or Edit Layout

6. Add the File Data Field to the Layout > Click Save

Start/Edit Process

1. Navigate to the Processes Module > Select a Project
2. Start or Edit the Process that contains the File Data Field
3. Navigate to the File Field
4. Drag & drop a File into the Data Field > Then the Upload Modal will open
5. Add the file description > Select a Folder > Update the File Custom Fields
6. Click Upload

Note: The ability to select a folder and manage custom fields has been added to the File Upload modal in this scenario only. The streamlined File Upload approach is on the near-term roadmap, to be added to all areas that allow users to upload files.



Copy File Options

When copying files to a folder with an existing file with the same name, a new version of the file was automatically created. In some cases, users wanted the ability to append the file to the existing file as the next version (essentially, versioning up). To help ensure files are being copied as desired, the following options have been added, 'Copy, but keep both files' or 'Copy and append the latest version to existing file'.

Copy file(s)

The following file(s) already exist in the destination folder

Aloha Meeting Type_123462.doc

Copy, but keep both files

The file(s) you are copying will be renamed to match the following example: "filename (1).docx" All previous versions will be renamed.

Copy and append the latest version to existing file

This option copies the most recent version of the file(s) to the destination folder as a new version of the existing file(s).

Continue

Cancel

Copy file(s)

1. Select the Documents Module > Select a Project
2. Copy a file to a Folder with an existing file with the same name
3. Select one of the two Copy Options
4. Click Continue

Hide Funding on a Process Layout

If you have contractors submitting invoices or other cost processes, we're providing a new ability to hide Funding information from the process layouts they access. Enables greater privacy and reduced errors by restricting the ability to view and manage funding from cost processes like invoices from those who have no business need to see or edit it.

Edit Section Fields

Section Field Properties

Field Name	Read-Only	Required
Commitment Invoice	<input type="checkbox"/>	<input type="checkbox"/>
Manage	<input type="checkbox"/>	<input type="checkbox"/>
Restrict users from seeing the funding rule per line items	<input type="checkbox"/>	<input type="checkbox"/>

This setting hides the ability to Manage Funding and restricts users from modifying the Funding Rule per line item.

Save Cancel

Setup

1. Select Setup > Manage Processes
Select the process where you wish to hide funding (applies to commitment, general invoice, commitment invoice, master commitment and invoices and budget change processes)
2. Click Page Layouts, select the layout on which you wish to hide funding
3. Right click on the cost entity in the layout to Edit field properties
4. Select the "Restrict users from seeing the funding rule per line items"
5. Click Save

Important note: hide funding may not be applied to commitment changes against commitments with funding

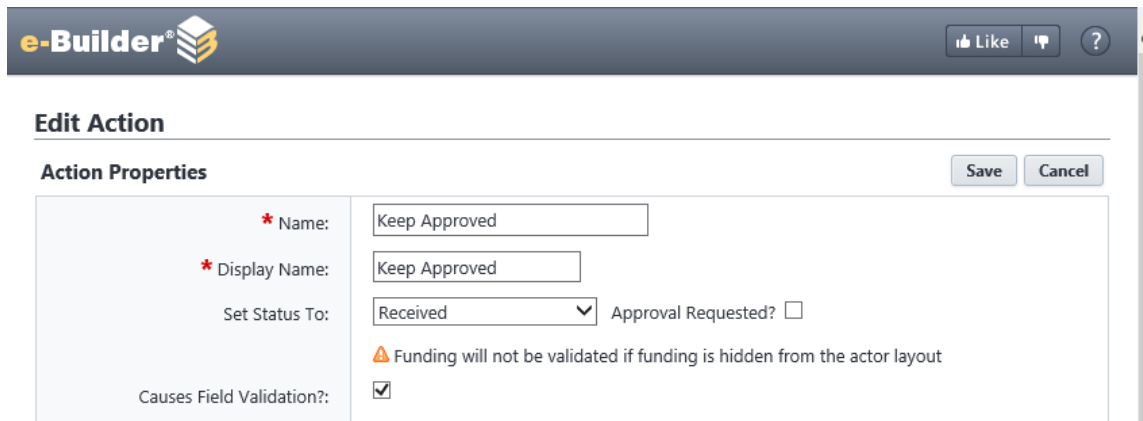
Start/Edit Process

1. Navigate to the Processes Module > Select a Project
2. Start or Edit the Process that contains the hidden funding as the actor you are hiding funding from (e.g. contactor on invoice or commitment process)
3. Populate all required fields for that layout
4. When adding the Cost Entity, select a line item for the cost entity (e.g. Budget Line Item for the Commitment Item) and click Close
5. Click Add to add the Item
6. Note that funding information will be hidden from line items and the manage funding button will be removed

Commitment Items							Manage Funding
Item Number	Line Item	Description	Current Budget	Funding Rule	Retainage Percent	Amount	Allow
001	10*3.ABC	test	11,004.00	Chris & Rule	0.00	0.00	<input type="checkbox"/>
Total			11,004.00			0.00	

Failed Funding Scenario

When funding is hidden and funding violations fail, e-Builder allows the invoice or other cost process to reach a received status with the failed funding information. The process actor who is submitting the process for approval must fix the funding validations at that point. Note that the system displays a warning when configuring the layout action to mark the status to “Received” status that “Funding will not be validated if funding is hidden from the actor layout.”



e-Builder Like ?

Edit Action

Action Properties Save Cancel

* Name: Keep Approved

* Display Name: Keep Approved

Set Status To: Received Approval Requested?

⚠ Funding will not be validated if funding is hidden from the actor layout

Causes Field Validation?:

Display timestamp for Comments

e-Builder customers were unable to easily determine the order in which comments were being made throughout a given day. To help paint a clear picture and provide an accurate record of when comments are left in the Submittal and other modules, e-Builder added a Timestamp to the comment thread.

Private	In Review	Comment
<input checked="" type="checkbox"/>		<p>John Smith, <i>Bright Construction</i>, 11.08.2016 01:55 PM</p> <p>120 volt or 24 volt is acceptable. Subcontractor shall coordinate with per contract</p> <p>[Make Public] Hidden from Review [Show]</p>

Add Comment Example

1. Select the Homepage > Select a Project
2. Select the Submittal Module from the Project Menu > Submittal Register
3. Click Add Item > Fill out the required fields > Click Save
4. Click the Comments Tab > Click Add Comment
5. Add a comment > Click Save

Comment timestamps are now available in the following areas:

- Schedule – Activity View and Details

- Submittals – Item Details, Package Details
- Workflow – Start Workflow

Lock Bid Tabulation Export

Enables your organization to lock the bid tabulation spreadsheet upon Export. Assists in meeting internal audit requirements and ensure bid information is not manipulated without an audit trail. For example, if your organization has a bid review process, you may export the Bid Tabulation spreadsheet and send it to internal stakeholders. To ensure all parties are reviewing the same information you can choose to lock the contents of the spreadsheet by configuring the new setting. Those who receive the spreadsheet will be able to view, but not edit the contents.

The screenshot shows a software interface with a navigation bar at the top containing tabs: Dashboard, Projects, Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, and Time Tracking. On the left, there is a sidebar with a yellow hard hat icon and a 'My Settings' menu with options: Membership, Personal Information, Preferences, Schedule, Subscriptions, and Views. The main content area is titled 'Options' and contains 'Bid Options' settings:

- Delivery Method:
 - Deliver via e-mail if contact has one, else fax
 - Deliver via fax if contact has one, else e-mail
 - Deliver via both e-mail and fax if the contact has them
- Project Contacts:
 - Automatically add all invited bidder contacts and companies to project contacts
 - Automatically add only awarded bidder contacts and companies to project contacts
 - Do not automatically add bidder companies and contacts to project contacts
- Require Password to Open Bid Tabulation:
- Required # of Users That Must Witness Sealed Bid Openings: 0
- Allow Bid Tabulation To Be Opened Prior To Bid Due Date:
- Lock Bid Tabulation Excel Export File: Prevent unwanted changes to excel worksheet
- Enable Electronic Bid Submission:

Setup

1. Select Setup > Bidding > Options
2. Select the Lock Bid Tabulation Excel Export File" option
3. Click Save

Note: this is an account level setting; it may not be enabled/disabled per bid package.

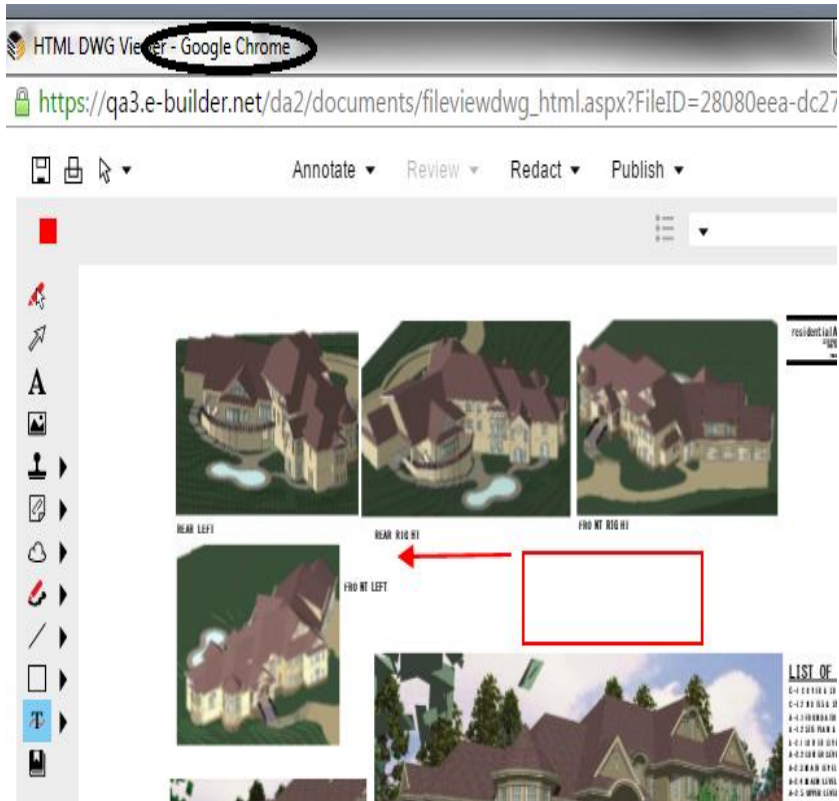
Export

1. Select Bidding> Select a Project
2. Select the Bid Package to be exported
3. Select the Bid Tabulation tab
4. Click Export

Note: the system will export the Excel file as locked with a randomized password

Redline Tool Update

As a follow up to the release of an updated version of the redline tool earlier this year, we've migrated existing redlines to a new format that works with the updated version of the tool. The updated tool works across all supported browsers (IE 11 and above, Chrome, Firefox, Safari). No Active X plug in needed. New contractors can perform markups without downloading Active X.



Setup

1. No setup needed, documents will be migrated to the new format automatically

Documents

There is no change to how the redline tool or markup files are accessed. Please note the new version of the redline tool does have some new and discontinued features. See Appendix A for additional information.

Funding Transaction Custom Fields

In instances when your organization needs to track detailed information about funding transactions, such as funding accounts in external systems, new Account Funding Transaction custom fields are available. Once setup these fields are available in Funding Source details pages, Budget Change funding process, oData and Reports that show each line as a transaction.

Funding Transaction Custom Fields

	Label	Variable Name
Edit Delete	Funding Txn Source Account	Custom_Funding_Txn_Source_Account

Setup

1. Select Setup > Cost> Custom Fields > Funding Transactions
2. Click Add
3. Follow the Wizard Steps 1 through 3
4. Click Save

Funding Transaction

1. Select a Project
2. Select Funding Sources
3. Click the Name of the desired funding source
4. Select Add funds to input a funding transaction
5. Funding Transaction Custom fields that have been enabled appear and values may be entered

Funding Transaction Custom Fields For: **Bond 2**

Funding Transaction Details

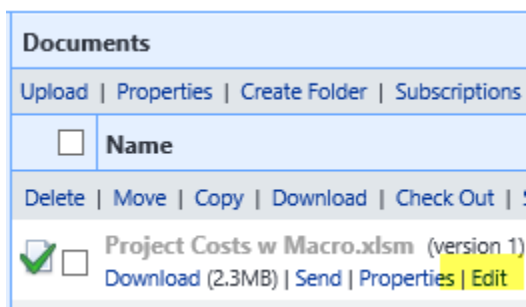
Description:	Bond 2
Amount:	100,000.00

Funding Transaction Custom Fields

Funding Txn Source Account:	cde123
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Edit Documents in Place: Support for Macro enabled files

Now macro-enabled files are supported with the Edit Documents in Place feature. Excel, Word and PowerPoint files of type .xlsm, .pptm and .docm are covered. Macro enable file types are typically leveraged for their advanced automation capabilities. When viewing options for Documents with these extensions, the Edit option shall be available. The documents will be editable using the locally-installed Excel, Powerpoint or Word application and without the need to check in/check out or upload separately.



Update Commitment Custom Fields from Cost Processes

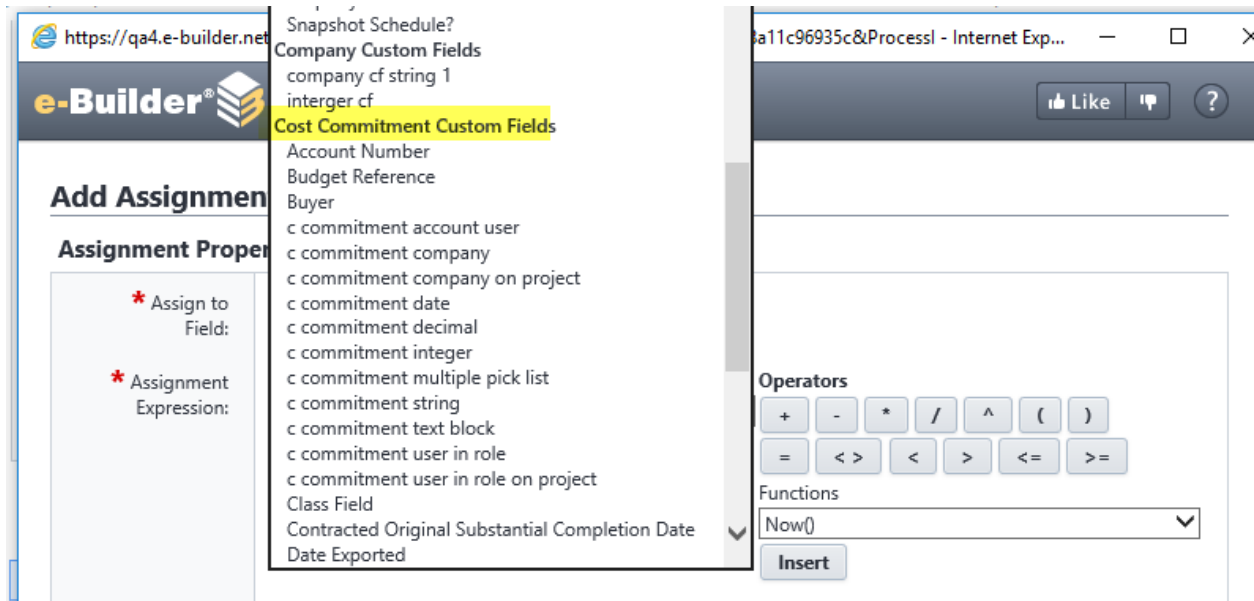
We're providing a new ability to make commitment custom fields available to other cost processes. For example, if your organization tracks insurance policy dates or other data points at the commitment level, you could now make those data elements available to a Commitment Change process through data field assignments.

Commitment Custom fields are now available to Commitment Change, Invoice and Dynamic processes.

Setup

1. Click Setup
2. In the left side panel Administration Tools, click option Processes, then click option Manage Processes.
3. Click the name link for process to implement the assignment in.
4. Click tab workflows.
5. Click link for the desired workflow
6. Click button design workflow.
7. Load the published workflow.
8. Right click on start step, then click properties.

9. Click the edit link for the desired action
10. Click Add Assignment
11. Note that Commitment Custom fields are available



Interface Improvements: Button Text Simplified

We continue to make interface improvements to make e-Builder easier to use. This release we've simplified the text in buttons throughout the application to make them easier to read and understand. We've also streamlined the process for starting invoices, eliminating clicks.

Button Text Update

The updated text states the action associated with clicking the button and eliminates redundant verbiage that is repeated in other areas of the page. For example, we've updated button text in the below areas, but you'll see this simplified button text approach in many other areas in e-Builder.

- Budget Line items - 'Add Line Item' to 'Add'
- Budget changes - 'Add Change' to 'Add'
- Notes - 'Add Note' to 'Add'
- Documents - 'Attached Documents' to 'Attach'
- Forms – 'Attach Forms' to 'Attach'
- Processes – 'Attach Processes' to Attach



Apply Template

Add

15 items in 1 pages

Projected Changes	Projected Budget
0.00	124.00
0.00	1,002.00

Start Invoice - Streamlined

Extra clicks have been removed from the process for starting an invoice. Now the Add Invoice button provides a dropdown choice to let the user select either a Commitment or General Invoice. Previously this selection was made after navigating to another page.