e-Builder 7.12 Upgrade

We are excited to bring you e-Builder Mobile for the iPhone® and iPod Touch®, along with new enhancements to the existing iPad® app.

e-Builder Mobile Q1 Release Notes

v1.2 for Apple® iPad®
v1.0 for Apple iPhone® and iPod Touch®

The e-Builder menu now displays by default when the Home page loads in portrait orientation.

You can now access and redline PDF files via the e-Builder iOS apps! To redline a file in the e-Builder iPad App:

Tap the **Projects** tab.
Tap the name of the project you wish to access.
Tap the **Documents** folder.
Navigate to the PDF file you want to markup. Redline icons display in the far right pane.
For more information, tap the Help icon () located in the toolbar of the e-Builder mobile application.

The Project contents list within the Projects   tab has been redesigned to make it easier to find items. Now a Documents folder and a Workflows folder exist to combine all documents and workflows in their respective locations.

Workflows now display the project name and workflow name at the top of each page of the workflow.

We redesigned some general attributes common to all Workflow pages to make functionality easier to discover and use, such as surfacing command buttons to the same horizontal plan that the Save button is on.

Users can now sort the items in their court (visible on the Menu tab within the e-Builder popover menu) by project or by date due.

The date picker has been redesigned to be more like the date picker within e-Builder Enterprise.

You can now filter the list of workflow instances of a given type by open /closed status.
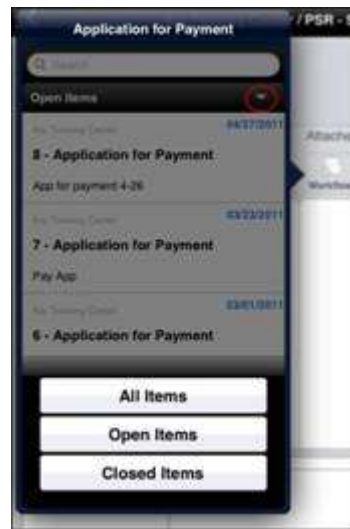
We added a border around large text boxes on forms to make it easier to know where to tap to activate the keyboard.

You can now filter the list of projects displayed in the e-Builder menu by status.

The **on-screen keyboard** now hides itself automatically when a user taps outside the keyboard on a non-text box area.

The **Attachments popover menu** has been enhanced to make access less confusing and to provide the ability to add an attachment from the menu itself.

e-Builder Mobile now provides you with feedback when a form is saved or submitted.

We have increased the point size of the text within the Comments text boxes to make it easier to read.

The Attachments page has been redesigned to simplify the attachment process.

We moved around some items on the Settings page to group them more logically.

In addition, based on direct input from our customers we are releasing a number of enhancements and new features that improve how you and other e-Builder users work with the software. The following outlines all the enhancements included in e-Builder Enterprise Release 7.12.

Usability Enhancements

| Summary	Module
Creating a new document folder is faster and easier. We've made a number of improvements in how you create and administer e-Builder Document Folders. First, all the "Add" a folder links have been changed to "Create" a folder. This more consistent terminology makes it easier for all users to learn and use e-	Documents

Builder Enterprise.

Next, when creating a new folder, e-Builder Enterprise now automatically opens the folder properties page once the folder is created. Additionally, the folder properties page has been re-organized to make it easier to set up as well. In one easy step, you can create a folder and set its properties, rules and permissions.

Also, new folders can be created automatically when uploading or attaching documents. When uploading or attaching a document, specify the destination location. It's OK if you're not already in that folder. If the folder already exists, then the document will be placed there. If the folder does not already existing, the folder will be automatically created as the document is uploaded.

Finally, the Folder Permissions page, accessed via the Documents Menu, can now be exported to Excel. Exported lists can be used to validate folder permissions configured in the system.
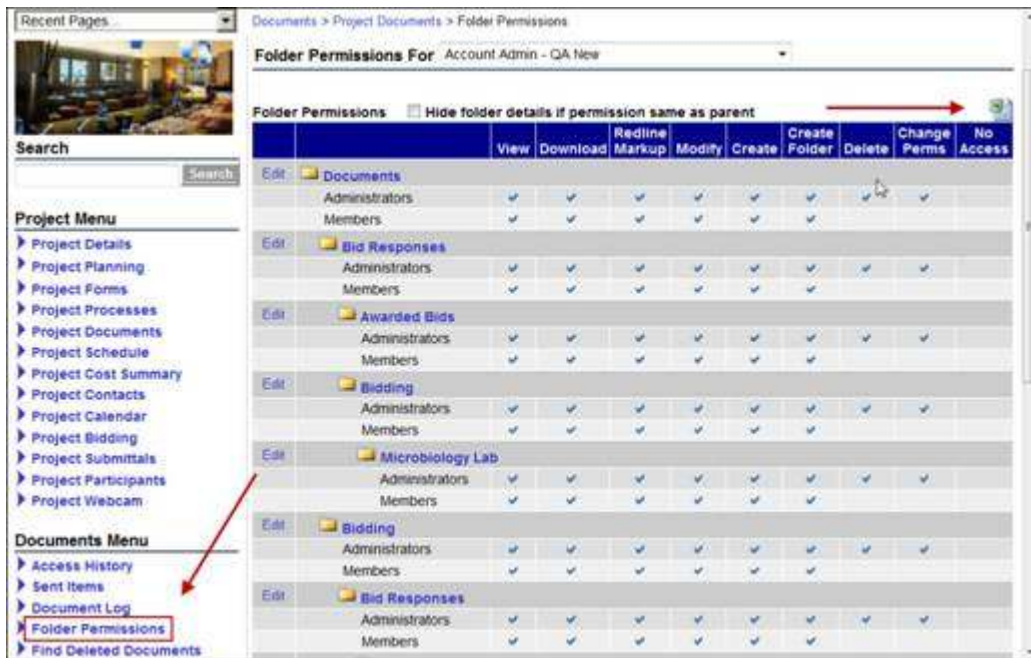
Link directly to documents stored in e-Builder. Simply copy the document's URL found in the Document Properties window to your Windows copy/paste clipboard. Once the document's URL is in the clipboard, it can be pasted into

Documents

other documents, spreadsheets, presentations or any other windows compatible file.

Get a quick snapshot of who has checked out a document from the Documents module main page. By hovering your mouse pointer over the associated "checked out" icon, you can now see who checked out the document and when.

Documents

Knowing who's checked out a document and when is an important control point when ensuring everyone is using the latest information. The Documents Log now displays check out information, including who checked an item out, the date the file was checked out, and a link to items the document is attached to (if any).

Documents

Easily identify who took the action that resulted in an email notification. Email notifications from e-Builder forms and processes now display the "From" name as the user that took the action that initiated the notification. For example, if John Smith takes an action that causes an email notification, it will display within your email inbox as coming from "John Smith via e-Builder".

Forms

Processes

Mail merging now handles attached images more consistently to other mail merge systems. When mail merging a form or process, the attached images will now appear at the end of the resulting merged document.

Forms

Processes

Structured processes help many of our clients save money, save time and improve their project outcomes. Therefore, easily creating and maintaining e-Builder processes is an important requirement. We've made a number of enhancements that will simplify how processes are created, updated, named and used to support e-Builder user's daily activities.

Keeping the e-Builder process accurate to the actual business process is the key to adoption. Maintaining processes is now much easier for the administrator. New with this release, an attached process or item can now be removed from a process. This is helpful when the wrong process is accidentally attached to another process. Also, some processes have multiple items added to them, and as activity progresses through the process, it is necessary or helpful to remove the unnecessary items. For example, several potential change orders items may be added to a draft change order process. As the final change order plans are determined, the unselected items can be removed, as well as new ones added.

Processes

When linking processes via a Lookup field, you can now provide your own label for the tab on the resulting linked process. This will help users better understand the linked process and make it easier for them to use it.
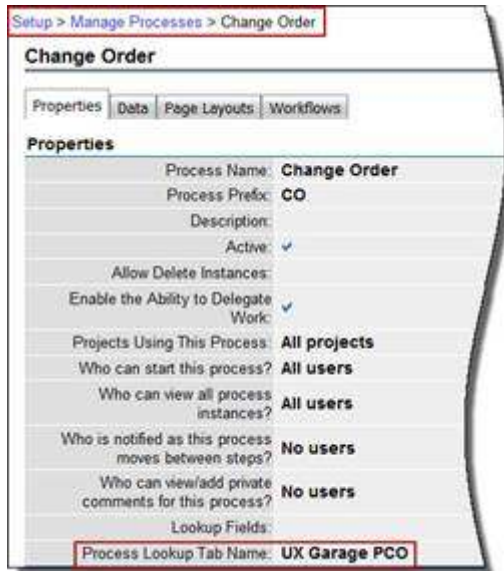
Hovering over the dependent process tab in the user interface will display the name of the primary and dependent lookup process names.

For more information on lookup processes and steps for configuring one, see About Lookup Processes.
Sometimes knowing when a critical process is completed helps to plan the next action. You can now set up an email notification to be sent out automatically when a process reaches the finish step.

Often, it is necessary for a process step to require additional documentation before it can be completed. To remind the user to attach the required documentation, e-Builder Enterprise will now allow administrators to set up a customized reminder that will be displayed when a user is attempting to take action on a process step. This setting is configured on the Add/Edit Action page.

Administrators can now define the width of the columns in the table that displays instances of processes attached via a Process Lookup field. This enhancement makes it easier to see a more complete view of a process.

Create a new project quickly with the new 1-button "Add Project".
With the proper permissions, you can now create a project from the Project tab   Projects within e-Builder.

Multi-pick lists are powerful and helpful ways to select several different items or values; however, the old method of pressing the "CTRL" button to select multiple pick list items at one time can make it difficult to see all the select items. Using e-Builder multi-pick lists have become much easier.

Multi pick list custom fields now allow you to select items from a list of available options and move them to a separate window of selected options. As an added convenience, you can also double click the options to move them to the selected box. This easier method eliminates the harder-to-use single list in which you had to use the "CTRL" button to select multiple items.

Projects

Having trouble with spelling? No worries. Now, all e-Builder Enterprise Notes and Comments fields have spell check functionality.

Projects

It is now even faster to update schedules. With the new batch edit capability, you can now update Schedule tasks that have been marked 100% complete. Previously, batch editing only worked on incomplete tasks. Now,

Schedule

batch editing works for both incomplete and complete tasks the same way.

We know you're busy, so we've streamlined how you mark tasks as completed. E-Builder Enterprise no longer asks you if you want to mark an item complete if you enter a finish date that is in the past. The item will be marked as complete by default if the finish date entered is in the past.

Schedule

It is now easier to identify Submittal notifications in your email Inbox. System generated Submittal notifications now have "via e-Builder" appended to the email "From" information. For example, an email notification that is generated because John Smith took action on a submittal item will display within your email inbox as from "John Smith via e-Builder".

Submittals

When creating a new meeting request, you can now add your name to the list of invitees without getting an error message.

Calendar