



e-Builder 2013 Q2 Enhancement Release

The e-Builder Q2 2013 Enhancement Release is all about – The Project. Projects are what you do. At any one time, you and your team will be managing several projects of all sizes at various stages of completion. It is vitally important that e-Builder provide you with the right tools for managing your projects. Tools built with the owner in mind.

With more than 7,000 development hours to both e-Builder Enterprise and e-Builder Mobile, the Q2 2013 Enhancement Release makes managing projects easier, faster and more comprehensively, such as project specific team member roles and Microsoft Excel project schedule imports. More importantly, we've added new features that significantly expand your capabilities to measure actual project performance and track project issues. As with all e-Builder Enhancement Releases, all our clients can immediately take advantage of the expanded capabilities and benefits.

Project Level Roles

Owners rarely have the luxury of so many people that everyone only does the same thing on every project. The reality is that project team members must be applied when and where most needed. Often, project quality can be improved by assigning team members to different responsibilities on different projects. For example, it may make sense to assign a team member as project manager on one project and an inspector on another. Or, project managers that specialize in smaller projects may make excellent sub-task managers on larger projects. Owners need the flexibility to optimize their resources.

Project Specific Roles provides that flexibility. A project manager can now be assigned to roles with project level permissions. That way, if two or more project managers are assigned to one project, one can be defined as the project lead and the other(s) assigned accurately to their responsibilities. Those permissions will then carry throughout the system when controlling project status updating, notifications and reporting.

Administrators are now able to select user role associations on the project level. Users can be placed in more defined roles, as opposed to being restricted to account level roles only. This is beneficial in cases where there is a PM on multiple projects, but they are only a lead on one of these projects. This PM can now be granted project level permissions pertinent to the project on which they are a lead. This feature makes it possible to establish permission levels more granularly – on a project by project basis.

A Project Role report type has been added to the Reports module which allows you to report on users by their project roles. This allows you to see user roles across projects.

Enhanced Scheduling

Managing the project schedule is every project manager's bread and butter. For an owner's project managers, managing the project schedule often entails synchronizing with the GC's schedule, tracking project milestones, and aligning the project status to cash flows. Time is essential and maintaining the project schedule must be quick and easy. The Schedule enhancements include...

- Microsoft Excel® Schedule Imports – More options for synchronizing with your GC's construction project schedules with the new Microsoft Excel import. The schedule import tool has been expanded to support both Microsoft Project and Microsoft Excel file types. Previously, .mpp file types were the only ones that could be used to import a schedule. This has been changed so that schedule managers or administrators can also import schedules using .xls and .xlsx files. Not only does this make it easier for importing from Microsoft file types, but it also streamlines the steps required to import Primavera P6 schedules.
- View Tasks Pending Approval – Schedule task managers are now able to see the tasks that are awaiting their approval from the Home page, in the 'My first 10 tasks' section. Previously, they would only receive an email notification. This provides an additional notification, and also offers a more convenient way to approve tasks while already within the system.

My first 10 tasks				
Project	Task	Finish Date	%	Manager
eB Construction	DD	10.19.2012	0%	Bois, Bruzenskey
eB Construction	Design	06.25.2013	50%	Bois, Bruzenskey

Tasks

Reduce the time needed to keep the schedule status up-to-date. Now, multiple schedule tasks can be updated directly from the Schedule Detail table. Change the task name, start and finish dates, duration and % complete for several tasks at once.

- Schedule Details Adjustments – The Update Schedule page has been updated to make it easier for users to update the calendar from working days to calendar days. The project name has also been added to this page so that it is easier to identify the project calendar being updated.

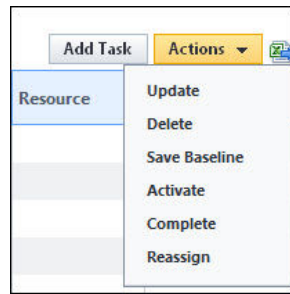
Update Schedule

Save
Cancel

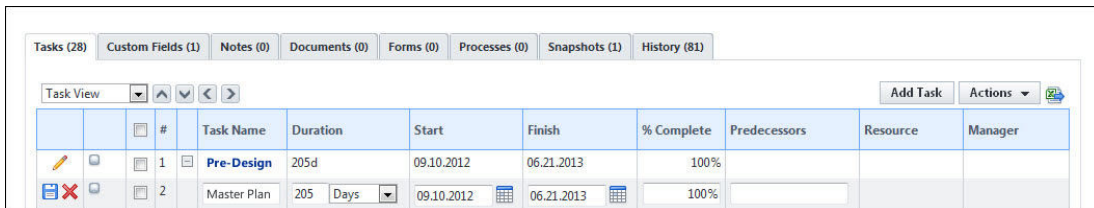
Schedule Details

<p>* Start Date: <input type="text" value="09.10.2012"/> </p> <p>* Hours per day: <input type="text" value="8"/></p> <p>* Hours per week: <input type="text" value="40"/></p> <p>* Days per month: <input type="text" value="30"/></p> <p>* Manager Role: <input type="text" value="Activity Manager"/></p> <p>* Manager User: <input type="text" value="Wiley, Mathia"/></p>	<p>Work Day Start Time: <input type="text" value="8:00am"/></p> <p>Work Day End Time: <input type="text" value="4:00pm"/></p> <p>Work Week: <input type="checkbox"/> Sunday <input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input type="checkbox"/> Saturday</p>
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- Schedule Details Action Buttons - All of the action buttons on the Schedule Details page have been added to a single drop-down menu to increase screen real estate and enhance the usability of this feature.



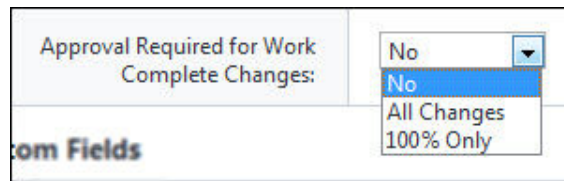
- Schedule In-Line Editing – The schedule can now be edited directly from the Schedule Details table as opposed to having to edit items individually. This reduces the time and number of clicks needed to update the schedule.



Task View	#	Task Name	Duration	Start	Finish	% Complete	Predecessors	Resource	Manager
	1	Pre-Design	205d	09.10.2012	06.21.2013	100%			
	2	Master Plan	205 Days	09.10.2012	06.21.2013	100%			

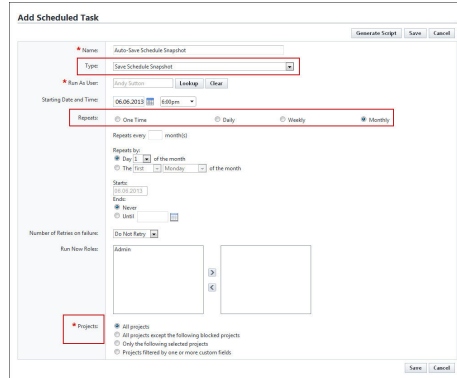
- Tasks and Duration Updates – While updating multiple tasks, users will also have the option to update the duration of a task. Previously, you were able to update the start, finish and % complete, but not the duration. This makes updating a large number of tasks more convenient and less time consuming because you no longer have to access each task individually.
- Task Updates – The behavior for updating the schedule’s finish date on a single task has been changed. Previously, if the finish date was added to a single task while it was being updated, but no start date was added, a constraint was automatically added to the start date, but the finish date did not automatically update according to the duration. Users are now able to update a schedule’s finish date and have the duration adjust accordingly. There is no longer a constraint confirmation when only the finish date is updated and not the start date. The finish date now updates accordingly, for more accurate management of the schedule.
- Task Details Page – A ‘Cancel’ button has been added to the Task Details page that allows users to easily return to the Schedule Details page after viewing their tasks. This reduces the number of clicks required to re-access this page.
- Schedule Details Expand/Collapse State - The expand/collapse state of the Schedule Details page is now remembered after users navigate away from this page. This makes the task viewing experience more convenient when working with a large number of tasks.
- Task Sequence Number - The task sequence number is now visible when viewing or updating a task, which provides a clear indication of task location within the schedule.

- Approval for Work Completed Updates - Schedule tasks can now be set to require approval whenever there are any changes made to the 'Work Completed' field. This was an existing field that posed the question of requiring approval only when the task was 100% complete. It had 'Yes/No' radio button options. This field has been changed to a drop-down menu with an added option of 'All Changes'. This field now functions for schedule managers to choose whether or not approval is required when any change is made to the task, only when the task is 100% complete or not to require approval at all. This enhancement gives schedule managers the option to be prompted when the % Complete is updated by a resource in order to cross check the accuracy of the data.



Clear visibility to all schedule updating history. Create permissions as to who can make changes to a schedule's baseline. Setup automatic saving of schedule baseline and periodic status snapshots. Then, track all schedule maintenance history. Now on the Schedule Details page, see all schedule baselines and maintenance activities, what was changed, when and by whom.

- Manage Baseline Permission – The 'Manage Baseline' permission has been added to the system so administrators can specify who can resave the schedule baseline. This allows administrators to restrict who can save the baseline after it has initially been saved.
- Schedule Baseline Snapshots – When the Schedule baseline is saved, a snapshot will be created. For tracking purposes, there will also be an entry in the schedule history of when the baseline was saved and by whom.
- Auto-Save Schedule Snapshots – Account administrators can create a scheduled task to auto-save schedule snapshots across projects. With this enhancement, schedule managers will not be required to periodically save snapshots, but can predefine a timeframe, such as a monthly schedule, for example. Snapshots allow scheduling managers to compare the schedule at different points in time. To schedule snapshots, go to the Setup > Automation> Scheduled Tasks >Add Scheduled Tasks.



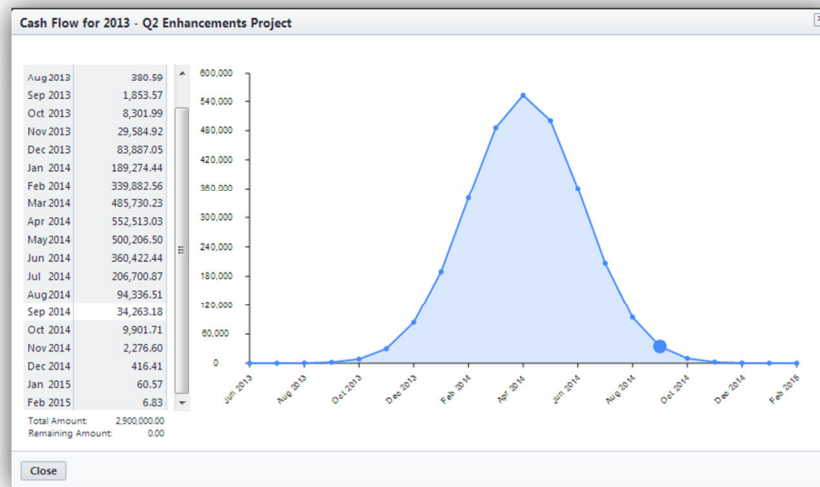
- Schedule History Tracking – A History tab has been added to the Schedule Details page that will capture changes to the schedule such as the addition/deletion of tasks, updates, and changes to the details of the schedule. Administrators and schedule managers will now have visibility into what changes were made, when they were made, and by whom.

User	Date	Task Name	Action	Description
Sylverne, Benouchka	05.15.2013 11:36 AM	DD	Created	
Sylverne, Benouchka	05.15.2013 11:28 AM	SD	Modified	End Date was set to 06.25.2013. Resource was set to Wiley, Mathia (e-Builder). Manager was set to Bois, Bruzenskey (Clody's Construction).
Sylverne, Benouchka	05.15.2013 11:27 AM	Design	Modified	Resource was set to Wiley, Mathia (e-Builder). Manager was set to Bois, Bruzenskey (Clody's Construction).
Sylverne, Benouchka	05.15.2013 11:19 AM	SD	Modified	Work Complete was set to 20 %.

Visual Cash Flows

A picture can be worth a thousand words. In the case of project cash flows, it could mean millions of dollars. It is often much easier to plan and analyze a project's cash requirements on a cash flow graph than by numbers in a table. Being able to see the curve, adjust the curve type, adjust the end-points, visually compare the current status to the baseline, can be often bring out real story.

Cash Flows have been updated to show a visual graph for each line item in the cash flow and in the overall project. Cash flow was previously entered in a manual fashion, but it has been updated to allow data entry using the points on the graph. This makes it possible to compare your baseline cash flow to your current cash flow on a single screen.





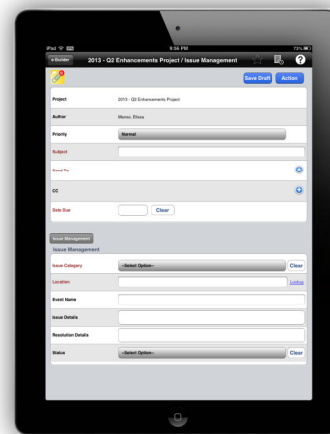
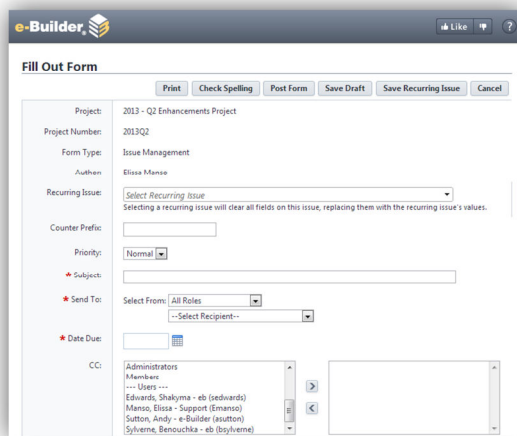
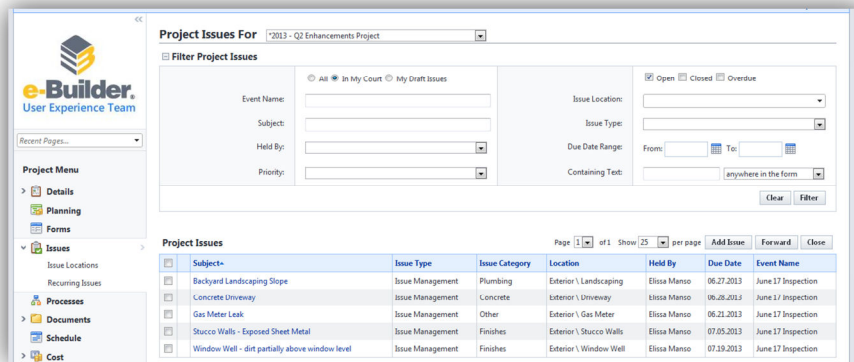
Project Issues Management

All projects have issues. It's a fact of construction that every owner must manage. Extending beyond punch list items, the new Project Issues Management feature gives owners an integrated and flexible method for logging, tracking and reporting on a wide-range of project issues, such as safety concerns or permitting issues.

Project Issues Management combines the electronic forms, automated business processes and centralized project information of e-Builder Enterprise™ with the field inspection power of e-Builder Mobile™.

The Project Issues forms and processes have been optimized for handling a large volume of issues at one time. It is now easier to log similar recurring problems (e.g. paint needs touched up), and streamlining issue notifications to the responsible party for remediation. Administrators have the ability to predefine locations for inspectors to use during walkthroughs. Both the inspector and administrator can specify and use recurring issues so that it's quicker and easier to log similar issues that are often encountered on site.

The Q2 2013 Enhancement Release provides project issues support in e-Builder Mobile™ for Apple iOS devices. Android support is planned for the Q3 2013.



Earned Value Management

Measuring the true status of a project can be a daily test for any project manager. They are constantly checking on task status; assessing the percentage complete; and comparing actual, committed and anticipated expenses to the project budget. Some project managers turn to Earned Value Management or EVM for monitoring, evaluating and forecasting project status. EVM has its beginnings in the 1960's and the U.S. Department of Defense. As such, some owners view EVM as complex and requiring specialized tools. e-Builder demystifies EVM.

EVM is a proven technique for managing and communicating project status. It combines project cost and schedule information into a single measurement system. When executed properly, it provides (1) an early warning system for cost overruns and/or schedule delays; and (2) a standard way to communicate project status. The new e-Builder EVM capabilities provide a way to track, analyze and report a project's earned value data.

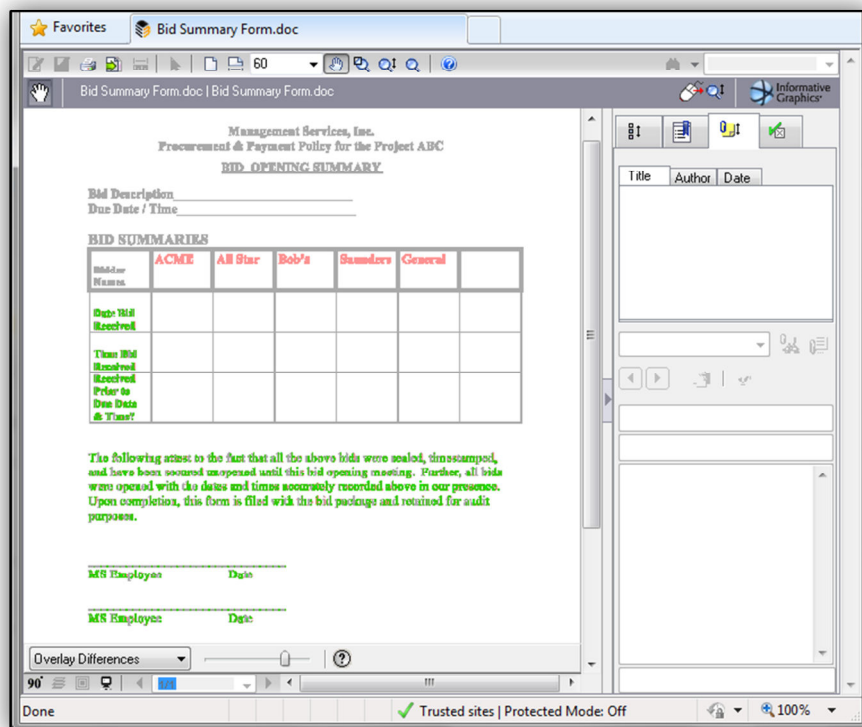
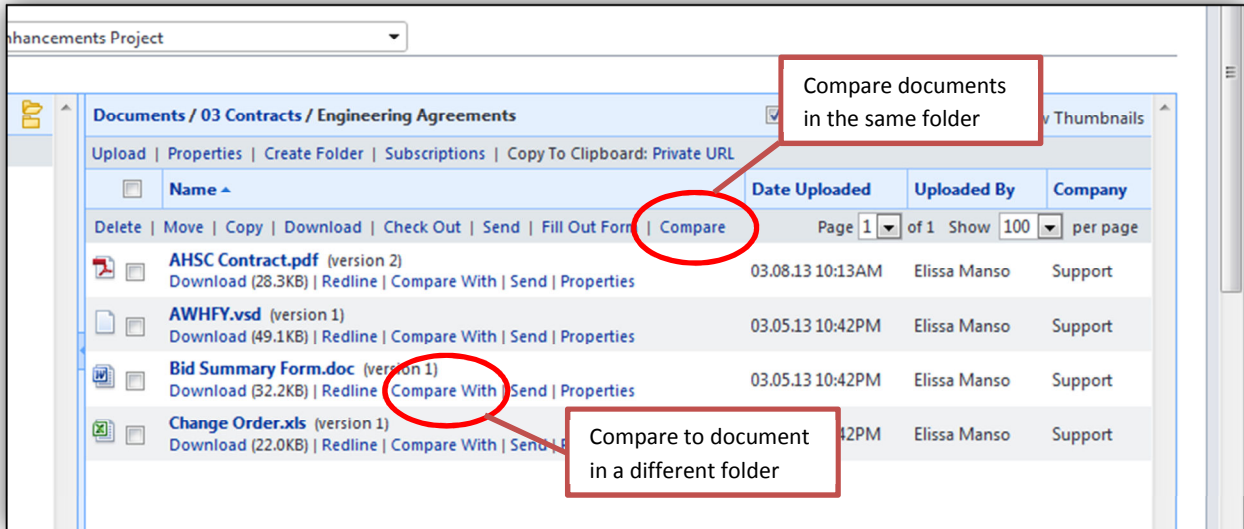
Since e-Builder Enterprise already excels at managing project costs and schedules, the basic EVM building blocks are inherently built in. Simply, setup your project as normal. Define the work tasks, schedule and budget. Begin work. As the project progresses, update the task percentage complete and pay invoices. Run the e-Builder EVM Analyzer Export and view the project's current earned value status in the e-Builder EVM Analyzer. Do "what if" analysis. Compare the current period to previous. Accurately evaluate and report on the project's current status, as well as forecast its future outcomes.

e-Builder EVM gives project managers the earned value management tools they need without investing in additional software, integrations or duplicate data-entry.



Document Compare

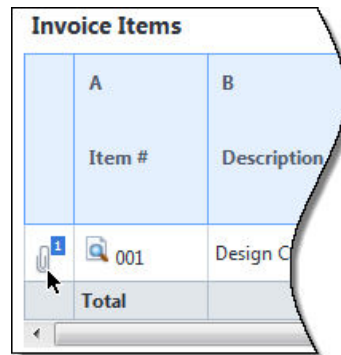
You now have the ability to compare documents to each other in order to identify the changes that have been made to the file. You can view files in different ways to best suite your needs; overlays with difference detectors, side-by-side views, highlighting the additions and deletions are all options that are available to you. Simply click the 'Compare With' link of a file in the Documents module to get started.



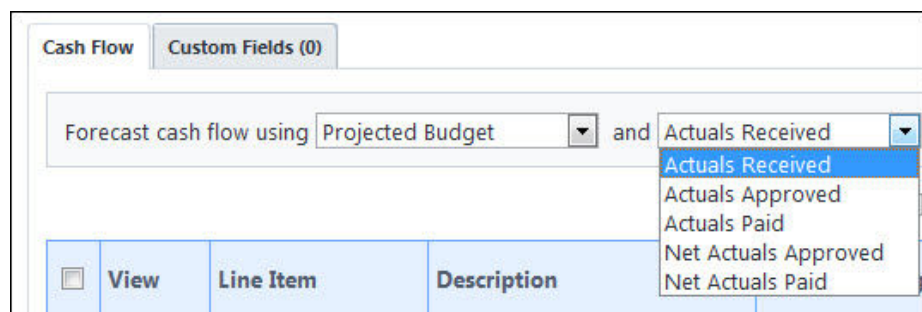
Additional Usability Enhancements

Cost

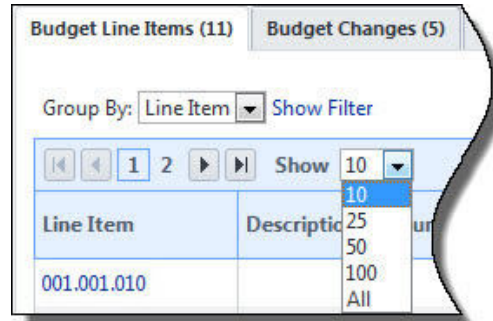
- Commitment Change SOV Imports – Schedule of Values imports can now be completed for all commitment changes, and not just allowance items. They can also include commitment line item custom field values. These imports make creating commitment changes and associated custom fields more convenient and less time consuming.
- Update Account Codes for Approved Items – You are now able to modify line items on approved commitments, commitment invoices and general invoices. This gives the invoice approver the ability to update the line item to the correct account code, in the event that the invoice was entered incorrectly.
- Invoice Line Item Attachments – You are now able to attach documents to invoice line items. A paperclip has been added to each line item where a document can be attached or removed from the invoice line item. This allows you to capture additional information at the invoice item level.



- Increased Limit of Invoice Numbers – The limit on invoice numbers has been increased from 30 to 50 characters. This increases the range of invoice numbers that can be stored in e-Builder Enterprise™ and increases our compatibility with third-party accounting systems.
- Cash Flow Invoice Status Options – You now have the option to complete cash flow projections by Actuals Received, in addition to Actuals Approved and Paid, which enhances cash flow capabilities by making one more invoice status available for cash flow projections. This allows you to project your cash flow on all available invoice statuses, which may complement internal business rules.

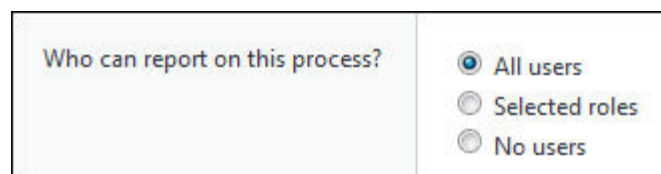


- Pagination Options on View Cost Pages – Pagination options have been added to the View pages in the Cost module. Users are able to display 25, 50, 100, or all items at a time. In addition, the speed performance of Cost pages has also been increased. This gives you additional viewing options for quicker viewing of cost items.



Forms & Processes

- Importing Existing Forms - Anyone with 'Import Form' permissions now has the ability to update existing form instances through an import. If new standards are introduced that include additional fields, this capability will allow you to easily implement updates to both new and existing form instances. To include existing forms in an import, simply add the project name, form counter, and field details.
- External Users Viewing Attached Forms and Processes – An option has been added to allow external users to view attached forms and processes as well as their associated forms and processes. This is an optional setting that must be configured on the individual form and process type. External users now have the ability to view additional detail regarding associated forms and processes. For instance, if a subcontractor’s daily report is attached to the contractor’s daily report and an external user requests comment on the contractor’s daily report, the external user will be able to see the subcontractor’s daily report as well.
- Specify Who Can Report on a Process – When adding a new process type, a default option for the field: “Who can report on this process,” will be set to “All Users.” Previously, there was no visual indication of the default option. Additionally, you are also able to select from specific roles or users.



The form contains the question 'Who can report on this process?' followed by three radio button options: 'All users' (which is selected), 'Selected roles', and 'No users'.

- Spawn Process Initiator – You are now able to define the process initiator of a spawned step. Previously, a spawn process could only be initiated by a previous process and the initiator was listed as “spawn process.” Under this circumstance, there was no accountability, as the

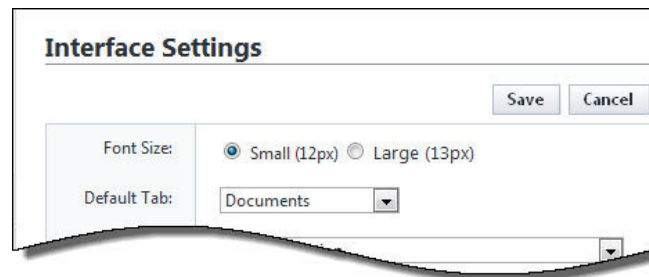
spawned process did not inherit any of the information about the person that initiated the spawned process. You can now choose the process initiator between the previous step actor and the parent process initiator. This allows you to have an actor for the spawned process.

Reports

- Company and Project Report Types – Project Companies and Project Contact report types have been added to the Reports module. You can now create a report of all the companies and/or contacts associated with a project. This feature enhances e-Builder’s reporting capabilities.

User Interface

- Text and Spacing Updates – The text in the interface has been updated to a darker shade of gray to increase readability. The font size can also be adjusted by going to the Setup > Preferences > Interface Settings. Notifications have also been updated with a larger font size and extra spacing has been removed where applicable.



Administrator Tools

- Delete Project – Account administrators can now delete a project within e-Builder Enterprise™. When a project is deleted, a request is submitted to e-Builder Support for execution. Administrators are required to re-enter their e-Builder password before deleting. Once deleted, the project cannot be recovered. Details of the deletion can be viewed by running an Audit Log Report. This enhancement allows account administrators to remove projects that have expired, saving storage space and removing project data, which may be required by certain vendors.

e-Builder Mobile™

Mobile Cost Processes

e-Builder Mobile has been expanded to now support your cost processes. Using either your Apple iPad, iPhone or Android device, you can now view, approve or take other actions on cost processes. Since a cost process form could have many different fields, editing a cost process still requires your internet browser. If click the edit button, the mobile browser will automatically open and you can then edit the cost process.

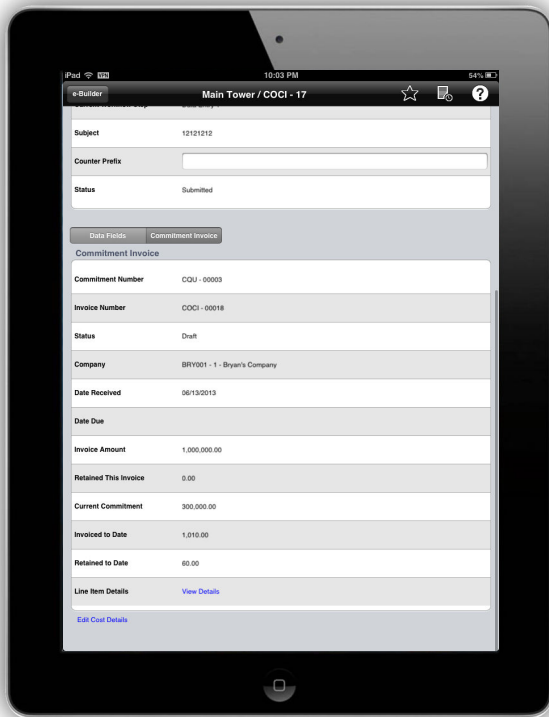


Image Upload Size Selection - Android

e-Builder Mobile™ for Android users are now able to select an upload size when uploading image files using an e-Builder Mobile™ application. By default, the image upload setting is set for users to choose a file size, but they can also configure a standard upload size. The options are: Small, Medium, Large, and Actual. Users now have a way to reduce upload time, which can be a factor when attaching multiple image files. This capability was released in Q1 2013 for Apple iOS devices.