



Q3 2016 Release Notes



September 15, 2016

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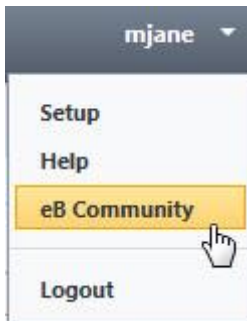
About the Q3 2016 Release

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
- A list of resolved cases in the month of September

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
August 31, 2016	1.0	Initial release
September 15, 2016	2.0	Maintenance release notes added Links to additional resources added

Summary of Features and Impact to Users

Feature	Immediately Available No setup required	Setup Required
Business Intelligence	✓	
• New 'Save As' feature	✓	
• Map charts	✓	
• User interface improvements	✓	
• Linked process reports	✓	
• Chained reports	✓	
• Multi-series charts	✓	
Submittals	✓	
• Add to package when creating	✓	
• Search packages by title	✓	
• Spec Section Populated by CSI Code	✓	
• Separation of Roles and Individuals to CC	✓	
• Optionally make fields required		
BIM	✓	
• Model tree enhancements	✓	
• Responsive toolbar	✓	
• Override Model Color	✓	
• Model tree search and navigation	✓	
• Enhanced model loading	✓	
• Object summary reports	✓	
General Usability Enhancements	✓	
• Documents: Redline Tool Updated	✓	
• Meeting Notifications: Display subject first	✓	
• Documents: Drag & drop indicator	✓	
• Project Menu: Default to All Projects	✓	
• Column Sorting – Attached Documents tab	✓	
• Apply Templates: Project level roles	✓	

Product Enhancements

Business Intelligence

New 'Save As' Feature

You can now copy and save new reports more easily. The new "Save As" feature will assist report users in making quick changes and saving as new, e.g. updating a filter to include 'Region.'

- New "Save As" capability
- Copy, tweak, and re-save new versions of a report to save time
- Leaves the original report unchanged
- See [BI User Guide](#) to learn more

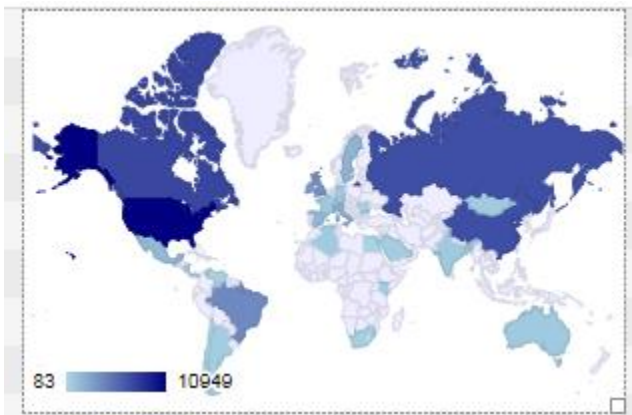
The screenshot shows a 'Save Report As' dialog box with the following elements:

- Report Name:** A text input field with a red asterisk indicating it is required.
- Report Description:** A larger text input field.
- Report Permissions:** Three radio button options:
 - This report is available only to me
 - This report is available to all users
 - This report is available to the following roles:
- Roles:** Two lists with arrows between them. The left list, 'All Roles', contains: A Role, Admin Demo, Admin's Administrator, Approve BCh Account, b Role, Bid Doc's, Bryan's Role, Budget Role, CC role for submittals, and Change Permission. The right list, 'Roles With Access', is currently empty.
- Report Folder:** A dropdown menu currently set to 'Cost'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom left.

Map Charts

Include a map in your reports to visually represent geographical data such as Estimate at Completion above a threshold across regions of your business.

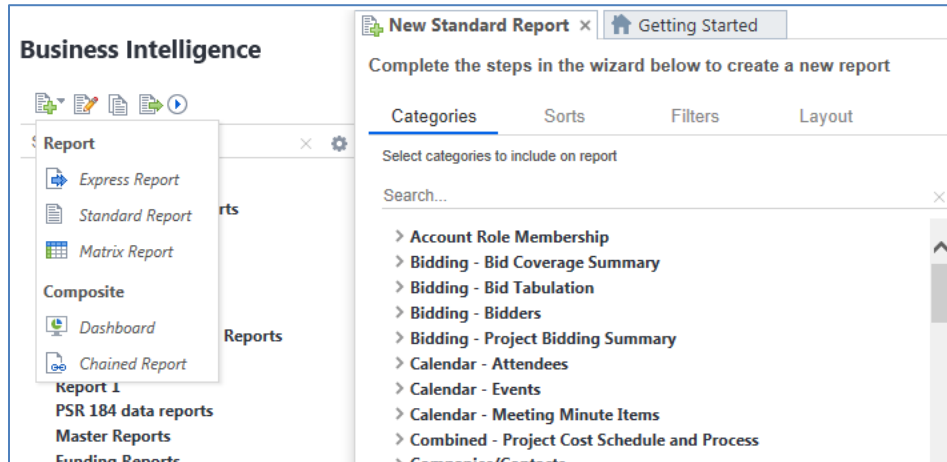
- New map element provides visual representation of geographical data
- Particularly applicable to organizations with a regional or multinational presence
- Views include World, North America, United States, Europe, Asia
- See [BI User Guide](#) to learn more



User Interface Improvements

Business Intelligence has a fresh, updated look. Its style and color scheme has been updated to match seamlessly with the rest of the product.

- Subtle redesign for improved usability and visual appeal
- Updated icons
- Verbiage more consistent with rest of e-Builder (e.g. matrix report rather than crosstab)
- See [BI User Guide](#) to learn more



Linked Process Report

Linked process reports can now be exposed in a BI report and Dashboard. The preexisting 'custom report type' feature allows you to link processes by a common data element, such as a project issue or action item.

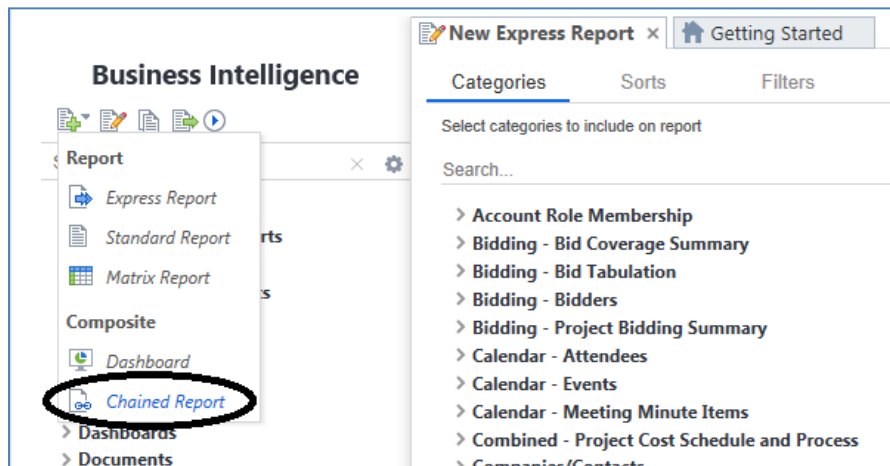
- Business Intelligence Reporting supports the Custom Report Type
- Enables reports that contain two processes linked by a lookup field
- Applicable to processes that contain common data elements, e.g. Issue and Action Item
- See [BI User Guide](#) & [Add Custom Report Types](#) to learn more

Custom Report Type Details	
Name:	DTP-RFI
Description:	
Active:	<input checked="" type="checkbox"/>
Relationships	
	Defect Tracking Process - DTP (Primary Process)
	process lookup - RF112 May or may not have a related record

Chained Reports

Chained Reports is a new report type that allows you to save multiple reports in one output file (PDF or Excel). This reduces the time it takes to prepare reports for senior staff and is especially helpful when you need to print reports or dashboards.

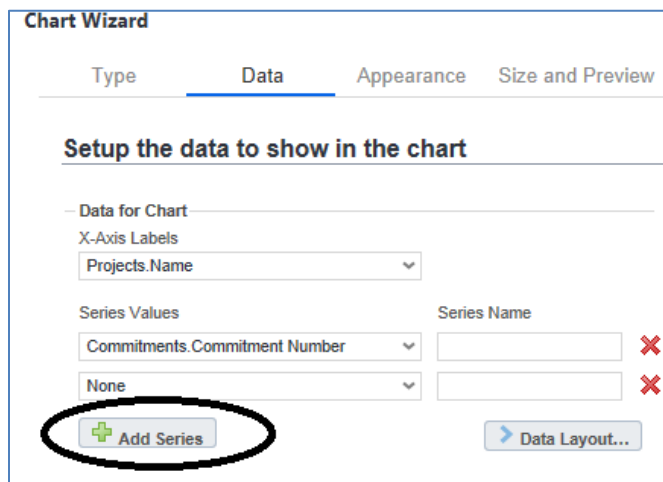
- New report type
- Save multiple reports in one output file (PDF or Excel)
- Easily generate hardcopy of combined reports and dashboards
- See [BI User Guide](#) to learn more

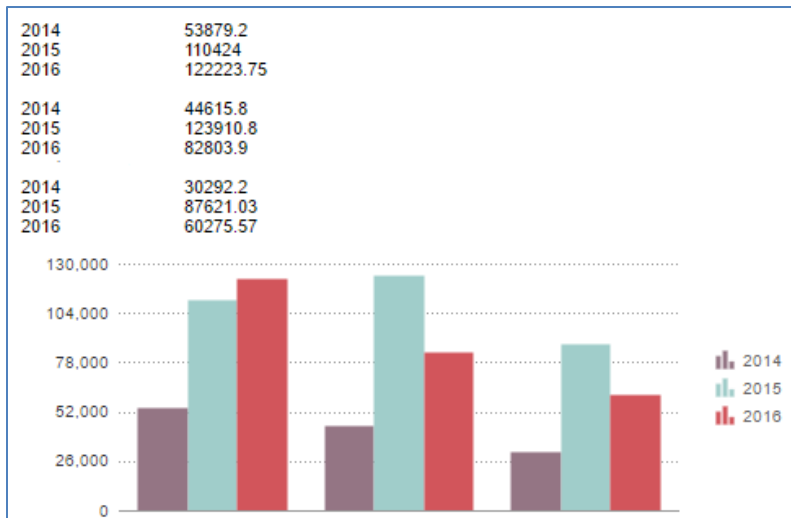


Multi-Series Charts

Multi-series charts allow you to compare multiple values across various projects such as Budgets and Actuals.

- Multi-series charts available
- Compare values across many projects for programmatic view
- See [BI User Guide](#) to learn more





Submittals

Add to Package when Creating

Add submittal items to packages upon saving in order to shave time and effort from a contractor's tasks if the desired package is known at time of entry.

- New ability to specify a package while initially creating the item
- Saves time and effort
- Available through import as well
- Immediately available, no setup required
- See [Add Submittal Items](#) for instructions

Add Submittal Item

Details

Project	eB Construction
* Title	Sanitary Drainage/Water Pij
Number	
Description	
Package	6-0 - Bathroom Fixtures
Spec Section	00 00 00 - PROCUREMENT AND CONTRACTIN
* Category	As-Builts
Responsible Sub/Manufacturer	

Search Packages by Title

An additional filter has been added to allow searching for packages by title. This eliminates the need for contractors and submittal coordinators to know the package number or description in order to search.

- New “Title” filter added
- Get the information you need more quickly
- Reduce reliance on smaller details such as package number or description
- See [Submittal Register Overview](#) to learn more

Filter Submittal Packages

Search In: All Pending My Review

Filter by Submittal Package Titles → Title:

Trade:

Submittal Package #: - - Rev:

Custom Field 1:

Custom Field 2:

Package Status: Open Closed Draft Overdue

Description:

Priority:

Clear Filter

Spec Section Populated by CSI Code

Administrators can allow the Spec Section field to pull from the CSI code list so that contractors select values rather than make free form entries for more accurate tracking and reporting.

- Allow spec section to pull from desired CSI list
- Provides greater control to owners to ensure data needed for operations and reporting is captured
- Only applicable if tracking packages with CSI List
- Validated through imports of new items
- See [Update Submittal Package Settings](#) for instructions

Submittal Package Options

Use CSI List: Yes

CSI List to Use: CSI MasterFormat 1995

Submittal Item Spec Section Populated by CSI Code:

Auto Numbering Packages: Per Code Per Project

Separation of Roles and Individuals to CC

The CC selection box on Submittals' Send/Forward pages are now split into their own selection boxes of roles and individuals. Both options are now more easily accessible as you no longer have to scroll through a long list of roles to find individuals and vice versa.

- Roles and individuals in separate selection boxes
- Eliminates the need to scroll past roles if you want to cc individuals
- Applies to Forward for Review, Request Comment and Send to Sub
- See [Send Submittal Package for Review](#) to learn more

The screenshot shows the 'Send Items to Sub' form. It includes fields for Project (Gain 1), Project Number, Send To (with a dropdown for roles), and Respond By. Below these are two separate selection boxes: 'CC Roles' and 'CC Users'. The 'CC Roles' list includes items like 'Modify', 'MW Process Admin', and 'New Process Role'. The 'CC Users' list includes names and email addresses such as 'Cross, Anita (2255 Partners)' and 'Fassberg, Julie (e-Builder)'. There are also radio buttons for 'Send Type' (Action Required or Notify Only) and a 'LookUp' button.

Optionally Make Fields Required

Administrators can choose the submittal fields to make required. This provides greater control to owners to ensure data needed for operations and reporting is captured. For example, if you're tracking submittals by spec section, make the field required so it is completed every time submittals are added.

- Choose which Submittal fields to make required
- Ensure reporting data is captured
- Supported in imports
- See [Make Submittal Fields Required](#) for instructions

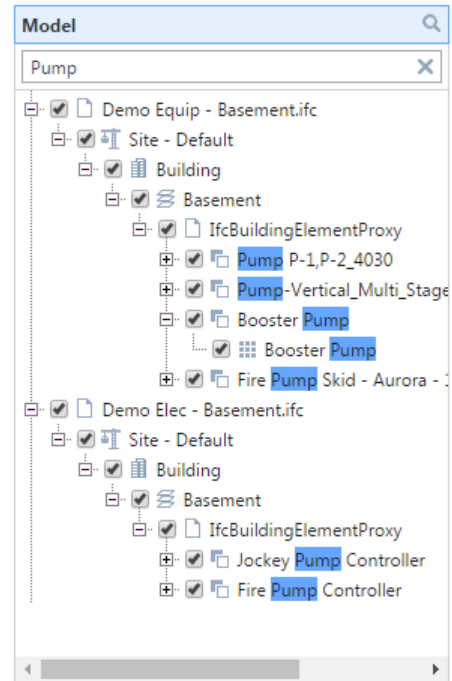
Manage Required Fields for Submittal Items		
Field Name	Description	<input type="checkbox"/>
*Project	The project name	<input checked="" type="checkbox"/>
*Title	The title of the submittal item	<input checked="" type="checkbox"/>
*Number	Submittal numbers are generated by e-Builder in increments of one. A number will be assigned to this item after it is has been saved	<input checked="" type="checkbox"/>
Description	The Description of the submittal item	<input type="checkbox"/>
Package	Submittal package numbers are auto-generated by the system per project or code, depending on the account setting	<input type="checkbox"/>
Spec Section	The specification section in this field. In many cases this will be the CSI code used on the submittal item	<input type="checkbox"/>
*Category	The category that the submittal item belongs to	<input checked="" type="checkbox"/>
Responsible Sub/Manufacturer	The name of the subcontractor or manufacturer responsible for completing the work for this submittal item	<input type="checkbox"/>
*Project Number	The project number	<input checked="" type="checkbox"/>
*Status	By default, all new submittal items enter the system in 'New' status. This status will be updated by the submittal coordinator after they review the item	<input checked="" type="checkbox"/>
*Item Status	The status of the submittal item. Submittal items are in a draft state when they're entered into the system	<input checked="" type="checkbox"/>
Priority	The priority level of the submittal item. All items are set to 'Normal' priority by default	<input type="checkbox"/>
*Revision	The revision number is automatically assigned when a revision is made to the item	<input checked="" type="checkbox"/>
Sub Section	The sub section in this field. In many cases this will be the sub section CSI code used on the submittal item.	<input type="checkbox"/>
Commitment	Ties a commitment to the submittal item.	<input type="checkbox"/>

BIM

Model Tree Enhancements

The BIM model tree has undergone a series of improvements to enhance performance and usability. For example, new search capabilities, improved selection and expansion, and expand/collapse controls help to make the model tree more functional and easier to use.

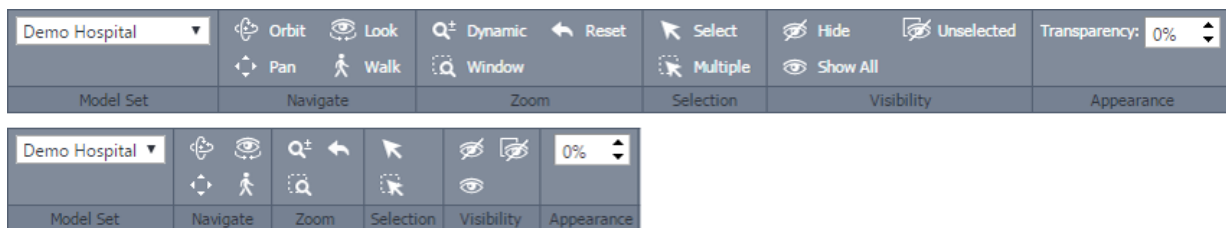
- General performance and usability enhancements
- New grid view with improved responsiveness
- Search capability
- Improved selection of groups of object in the tree
- Auto expansion and selection of the objects in the tree when selected in the viewer
- Expand/collapse all controls
- See [BIM Viewer Page Overview](#) to learn more



Responsive Toolbar

The BIM toolbar now dynamically adjusts to support resizing of the viewer window, making it easier to use on low resolution or small screens such as mobile devices.



- Toolbar dynamically adjusts to support resizing of the viewer window
- Smoother navigation
- Easily switch from the full toolbar with labels down to just the icon view
- See [BIM Viewer Page Overview](#) to learn more



Override Model Color

BIM users can now customize the model by making each one a color of their choice. If your organization has existing CAD standards that dictate colors by trade or function, you can select the appropriate color for those models or have the system dynamically assign one for you.

- Override the color for each model included in the model set to be consistent with CAD standards
- See [Edit Model Sets](#) for instructions

* Models					
Model Name	Use Latest Version	Version	Version Date	Override Color	
<input type="checkbox"/> Demo Pipe - Basement.ifc	<input checked="" type="checkbox"/>	1	08.15.16 01:32PM		
<input type="checkbox"/> Demo HVAC - Floor 1.ifc	<input checked="" type="checkbox"/>	1	08.15.16 01:27PM		
<input type="checkbox"/> Demo Equip.ifc	<input checked="" type="checkbox"/>	1	08.15.16 01:26PM		
<input type="checkbox"/> Demo Elec - Basement.ifc	<input checked="" type="checkbox"/>	2	08.19.16 05:54AM		
<input type="checkbox"/> Demo Architecture 2016.rvt	<input checked="" type="checkbox"/>	1	08.15.16 01:23PM		

Enhanced Model Loading

Model loading has been optimized to perform quicker and significantly reduce the amount of data you need to download for Revit and IFC files, whereby reducing the wait time for models to load into the viewer.

- Reduction in data needed to downloaded
- Improved load time for Revit and IFC files
- See [BIM Viewer Page Overview](#) to learn more

Object Summary Reports

BIM has a new interface for sorting, grouping and searching through all object data in a model set. The Object Summary pane provides a simple way to find and filter data to get counts or search for specific property data by selecting the data columns to display.

- A new pane 'Object Summary' provides an interface to sort, group, and search object data
- Save filters for the ability to quickly retrieve result sets
- Export to Excel
- See [BIM Viewer Page Overview](#) to learn more

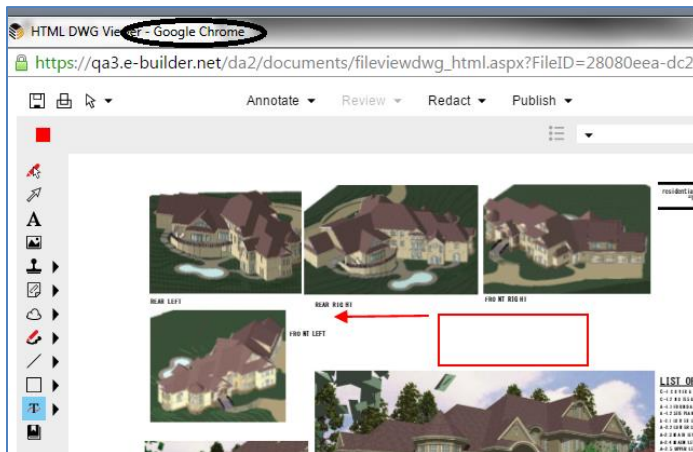
Level > Category	Category	Family Name	Assembly Description	Type Mark	Level
Level: Basement Floor Plan (1 Items)					
Category: Doors (1 Items)					
42" x 84"	Doors	Single-Flush	Interior Doors	111	Basement Floor Plan
Level: Second Floor (84 Items)					
Category: Doors (141 Items)					
36" x 84"	Doors	Single-Flush	Interior Doors	1	First Floor
36" x 84"	Doors	Single-Flush	Interior Doors	1	First Floor
36" x 84"	Doors	Single-Flush	Interior Doors	1	First Floor
36" x 84"	Doors	Single-Flush	Interior Doors	1	First Floor
36" x 84"	Doors	Single-Flush	Interior Doors	1	First Floor
36" x 84"	Doors	Single-Flush	Interior Doors	1	First Floor
36" x 84"	Doors	Single-Flush	Interior Doors	1	First Floor
36" x 84"	Doors	Single-Flush	Interior Doors	1	First Floor
36" x 84"	Doors	Single-Flush	Interior Doors	1	First Floor
3 x 7'	Doors	Hall Glass Door 7645	Interior Doors	3	First Floor

General Usability Enhancements

Documents: Redline Tool Updated – (This feature will be included in a future release)

Document redlining has gotten even easier. Contractors and consultants can now markup files without downloading an Active x plugin and can do so in all supported browsers.

- No Active X plug in needed
- Available in all supported browsers (IE 11 and above, Chrome, Firefox, Safari)
- Updated interface
- Old markups created by previous version are automatically converted
- Old markups may be opened and edited with the upgraded version of the tool
- See [Redline Documents](#) for instructions



Meeting Notifications: Display Subject First

The Subject line of meetings and notifications has been updated so the meeting subject appears first, prior to the project name. Attendees can decipher the topic of a meeting at a glance, especially when viewing from a mobile device where subject lines are often truncated.

- Meeting subject appears first
- Subject visible on mobile devices
- Save time: Not necessary to click into meeting to see the topic

Documents: Drag & Drop Indicator

A drag-and-drop indicator now appears on the Documents tab to assist those who are unfamiliar with this capability.

- Visual indicator that files may be added by drag and drop
- Add documents more quickly than browsing and uploading
- Indicator added to all areas where documents can be attached

Documents (0)	Comments (0)	Custom Fields (1)	Revisions (0)
			Attach Documents
File Name	Attached By	Date Attached	
Drag and drop files here to upload, or browse.			
			Attach Documents

Project Menu: Default Selection

The Project Selection box has been relabeled from 'Select a Project' to 'All Projects' to better convey when you are on account-level pages.

- New visual indication that all projects are initially selected on account level pages
- Menu text updated from "Please select a project" to "All projects"
- New and infrequent users have more clarity that these pages can include data across multiple projects until a project is selected

All Projects
▼

Column Sorting – Attached Documents Tab

The File column on the Documents tab of several pages is now sortable. In addition, the system will remember your sort order throughout multiple sessions to help you quickly locate desired documents.

- Sort attached documents: Cost, Bidding, Contacts, Submittals, Processes, Forms and Planning
- Sort order is saved between sessions

Apply Templates: Project-Level Roles

When applying templates to a project, several items can be included, such as users, projects and documents. Now, project level roles are also an option. Copying user's project level roles into new projects is a great time-saving feature for administrators.

- New ability to apply project level roles from source to destination project
- Save time placing users in roles
- See [Apply Project Templates](#) for instructions

Project Name	Project Administrator
Carrier Dome Expansion	Reilly, Matthew
Select a project template	Select a custom field. ▼ Select a value ▼ Hall of Languages Remodel ▼
Select items to import	<input checked="" type="checkbox"/> Users <input checked="" type="checkbox"/> Include Project Level Roles <input type="checkbox"/> Project Groups

Need Help Training or Implementing?

If you or your organization needs assistance in implementing or training on any of the enhancements you see here, please feel free to reach out to your account manager. If you don't know who that is, call 1-800-580-9322.

Resolved Cases

The following is a list of resolved cases for the month of September. 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	1
Dashboard	1
Mobile	3
Processes	6
Reports	4
Setup Admin	3
Time Tracking	3

Cost

Case Number: 179451

Under certain circumstances, invoice approval cost control checks were not properly looking at negative values for budgets. Cost controls now accurately evaluate negative budget values.

Dashboard

Case Number: 184315

Users were able to choose groupings for dashboards of approved invoices by week when the grouping option was unavailable and this caused an error to occur. The grouping option will no longer be an available selection for these reports when grouping is available so errors of this kind no longer occur.

Mobile

Case Number: 160037

When overriding an Instance through the iPad interface, there was no option to set the Status of an instance as status options were unavailable. This issue has been resolved. Status options are available on the iPad and all mobile device interfaces as expected.

Case Number: 186549

Administrators weren't able to submit process instances from the iOS mobile app for processes which had dynamic grids that were previously deleted. This issue has been corrected. Now, when dynamic grids are deleted from a process this will not inhibit users from starting the instance on the mobile application.

Case Number: 152734

Users were unable to submit processes requiring a password from the mobile application. Password-protected processes can now be submitted from e-Builder Mobile without issue.

Processes

Case Number: 181443

Previously, the layouts grid did not indicate whether or not a layout was being used. There is now clear visual indication when layouts are in use.

Case Number: 187795

In some instances, the drop-down values in dynamic grid templates were empty because a comma was included in the name. This has been resolved and the system will now handle commas in the titles and will not clear drop-down value options as a result.

Case Number: 188084

Previously, users were unable to edit the description field on change items for commitment changes after they had been added to the items grid. Now, the description field will be editable while in the grid.

Case Number: 188292

Approving dependent commitment change processes via code step intermittently failed. The source of the error is now being determined after failing to allow reprocessing if applicable.

Case Number: 192197

An error occurred while copying a process with special characters in the data field description. This issue has been corrected. When special characters are included in data field descriptions it will not cause an error upon saving a copied process.

Case Number: 193359

Configuring an action to add actors to the next step from selected roles with the option to select users from child projects for a Master Commitment Change process did not populate the list of available users when the action was taken. Now, the users in the roles selected from the child projects will be listed as expected.

Reports

Case Number: 164771

In certain instances, approved timesheets were not viewable in Reports. This issue has been resolved. Users can now report on timesheet data without error.

Case Number: 187999

Previously, when a user was removed from a project level role in addition to role removal from project, the audit log included several other actions that were not taken. Now, project role removal and additional actions taken thereafter are accurately logged without any additional actions recorded.

Case Number: 190392

Invoice import templates that included additional white space in some of the cells would cause an error upon import. This issue has been resolved. The system will recognize the presence of whitespace and no longer caused an exception when identified.

Case Number: 192286

Previously, if a scheduled report was set up to get information from both an e-Builder Document folder and FTP delivery, there was a chance that it would try to deliver the FTP file first and fail if the FTP server was not available causing the Document Folder to never be updated. Now, Email and EB Document Folder delivery types for scheduled reports will always occur before FTP to prevent the entire process from failing.

Setup Admin

Case Number: 176117

Previously, intermittent issues caused some scheduled tasks to fail when updating cost summary information due to a database deadlock. Now, the cost summary updates are set to retry multiple times before causing an error to ensure deadlocking is no longer an issue.

Case Number: 189390

In some cases, schedule task reported false error due to additional white space being added to certain column values. This has been corrected and the system now trims whitespace before comparing for errors.

Case Number: 189409

A specific error was being recorded with the incorrect invoice status cited. This issue has been corrected and the error message now includes the current invoice status.

Time Tracking

Case Number: 186783

Saving a timesheet would cause an error intermittently, as default object values weren't validating. This issue has been resolved. There is no longer an intermittent error when saving timesheet that are related to multi-value fields.

Case Number: 189493

In some cases, the timesheet workflow failed when spawning an invoice process. This issue has been corrected. The timesheet workflow generates invoices as expected.

Case Number: 193961

Some timesheet workflows were stalling at the conditional or automated steps. These workflows will now process successfully.