



Q3 2018 Release Notes

OCTOBER 19, 2018

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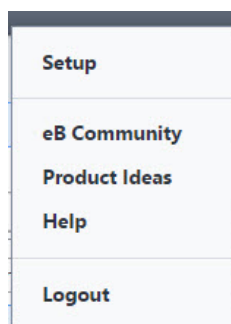
About the Q3 2018 Enhancement Release

e-Builder quarterly enhancement releases include improvements to targeted areas of product functionality and usability enhancements that increase the ease-of-use of current features and functions across the entire product.

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 Product Ideas** – The Product Ideas portal 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. Number of votes is one of the factors taken into account when forming e-Builder's roadmap. To access the Product Ideas portal, click the arrow next to your username within the banner of e-Builder Enterprise, and then click Product Ideas.



- **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.

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
October 19, 2018	1.0	Initial Release

Enhancements

The following is a list of enhancements included in the release. If you have any questions regarding this release, please contact e-Builder Support at 888-288-5717 or via email at support@e-builder.net.

File Transfer Technology Update

In the Q2 2018 Enhancement Release, e-Builder introduced the first release of a new file transfer technology update to improve performance and stability for file transfer operations. The initial release updated the underlying technology that is used for both upload and download operations in the Documents Module. As part of the Q3 Release, e-Builder has implemented the new file transfer technology update to additional areas of the product where documents can be attached, uploaded and downloaded.

Downloads

The process for downloading files remains the same in this release. The technology changes that occurred are all behind the scenes and you will continue to be able to use the download link to download a file or multi select to download a group of files.

Uploads

In the past, there have been several different interfaces for uploading documents, each with slightly different capabilities. We looked at the varying uses of the multi-file, single-file, and drag & drop upload tools to come up with a standard interface with the best combination of functionality.

The new interfaces can still be accessed by clicking the Upload link or by dragging and dropping onto the documents pane. The new interface supports drag & drop for both files and now also folders. Adding files descriptions as a group or to individual files has been standardized as well.

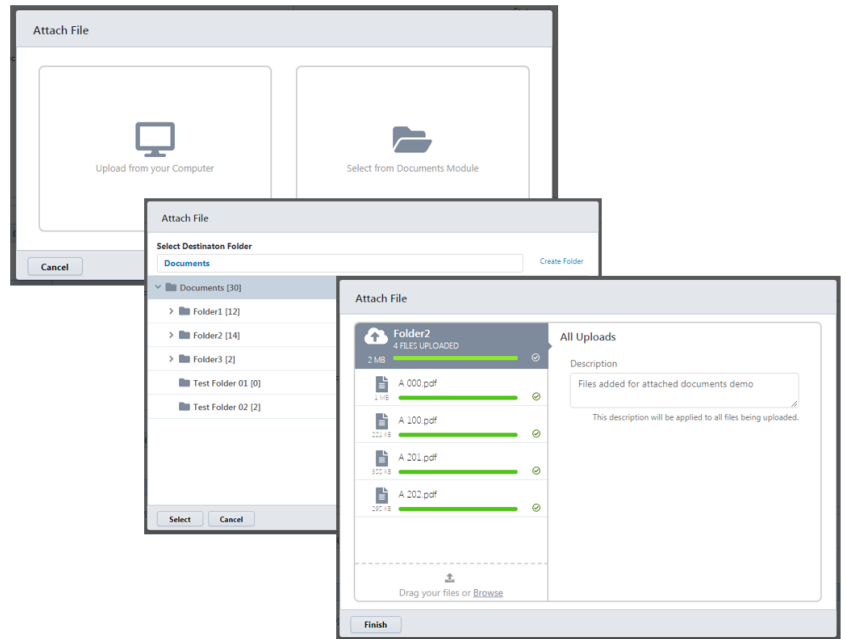
This new upload tool supports all modern browsers such as Chrome, Firefox, Edge, and Safari. All users accessing e-Builder from these browser platforms will see the new upload tool. Users of Internet Explorer 11 (and earlier) will continue to use the existing single file, multi-file and drag and drop upload tools.

Attached Documents Updates

In addition to the Documents Module, the new upload technology will now also be used when transferring documents from the attached documents tab for the modules listed below.

Updated Modules:

- Submittals
- Commitments
- Invoices
- Project Details
- Planning
- Bidding
- Companies/Contacts
- Cash Flow
- Funding
- Equipment



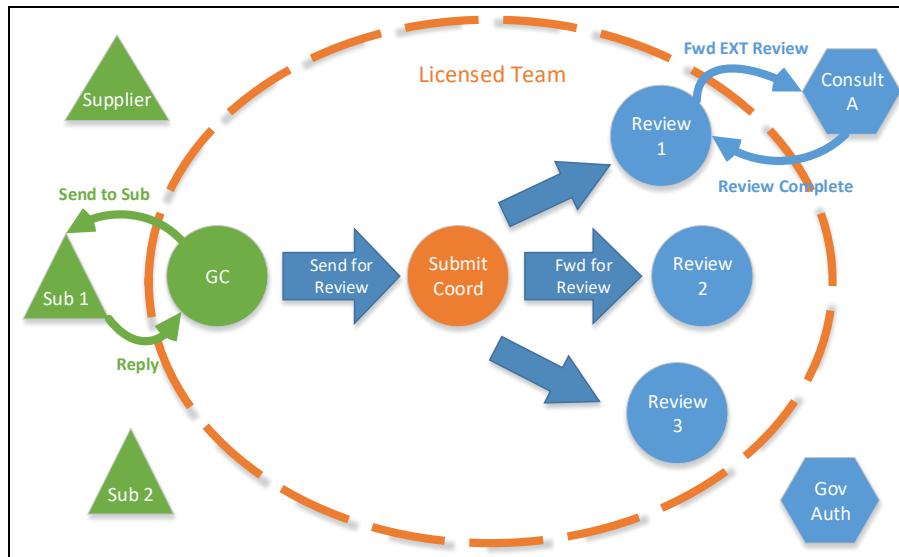
Submittals

Overview

e-Builder has made several enhancements to Submittals targeted at extending the solution to allow project teams with sub/trade contractor who are able and willing to participate in using the e-Builder PMIS to create and submit submittals. With these new enhancements enabled, e-Builder licensed subcontractors (and suppliers) can now initiate submittal register items and packages as needed, upload documentation for review, and forward to the general contractor to start the review process.

First and foremost, there are no changes to the existing functionality in submittals or any effect on existing submittals in e-Builder. The new enhancements are additional capabilities that, once configured, provide additional features to support additional subcontractor use cases. If you choose not to utilize these new capabilities, there will be no change or impact to how you currently use submittals in e-Builder.

Existing e-Builder Submittal Workflow



Submittal Enhancement Capabilities

In e-Builder's current submittal module, the General Contractor (GC) or other user in that role is the starting point for creating submittal items and starting the review process. With the new enhancements designated subcontractors can now be given a new Submittal permission called Create Submittals which will allow the user to kick off the submittal review process on individual submittals and submit them to the GC. The GC does not have to proactively create every submittal item and send to the subcontractor for response.

Who Is This Solution Designed For?

e-Builder designed the new enhancement based on requests and research with customers and partners. While all customers can use and find value in the enhancements, in general, we have found that customers who requested and needed these enhancements typically have the following characteristics:

- Projects with more sophisticated, involved subcontractors
- Complex projects with thousands of submittals
- Projects with multiple general contractors

The new enhancements provide the follow capabilities:

Expanded Submittal creation:

- A new submittal permission optionally grants certain roles the ability to create submittal register items and packages.
- A new action enables the subcontractor to forward submittal items to the GC for review.
- A new setting identifies the role that performs GC submittal duties per project.

Accountability:

- A new review period for the GC can be tracked and included in reports.
- A new account setting notifies the submittal coordinator when the design review is completed in situations where serial reviews are performed.

Configuring New Submittal Enhancements

In order to utilize the new submittal enhancements, there are a few configuration settings that will need to be implemented in user permissions and project submittal settings.

Give permission to subcontractor role:

Subcontractors or similar users can be given a new permission called Create Submittals. The permission methods follow the existing Submittals permission capabilities in e-Builder and can be assigned to roles or users at the Account or Project level. Submittal permissions are located Setup >> Users >> Manage Permissions under the Submittals Tab

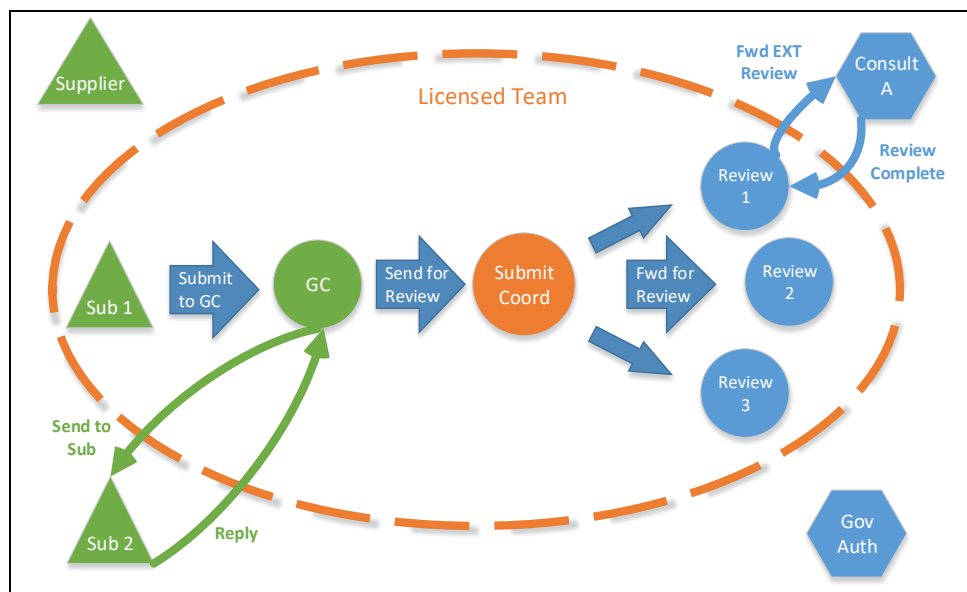
Configure submittal settings on the project:

After at least one user in a role on the project has the Create Submittals permission, a new Subcontractor Options panel will be available on the project-specific Submittals Settings page at Project Menu >> Submittals >> Settings.

These settings enable you to:

1. Specify which General Contractor role will receive submittals submitted by the initiating subcontractors.
2. Determine the default Due Date offset for the Contractor to complete an initial review before submitting to the Submittal Coordinator. Follow these steps to configure the settings.
3. Determine whether the Contractor Due Date is calculated in working or calendar days

Enhanced Submittals Workflow



Using the new submittals enhancements

With the new enhancements enabled, subcontractors or other configured users, will be able to create submittal items, create submittal packages and use a new action called Submit to GC. The subcontractor will typically follow these steps:

1. Create one or more submittal items.
2. Create a submittal package and add the items to the package.
3. Use the new Submit to GC button to submit the items to a general contractor
 - a. When using the Submit to GC action, the user selects a individual recipient from the general contractor role assigned in the project submittals settings, adjusts the review due date, CC users and adds comments.

When the Submit to GC action is taken by a subcontractor or other user on a submittal item the following actions will occur.

- The item(s) will be sent to the selected general contractor user.
- The general contractor user will receive a notification and the item will be in their court.
- The new date detail field Date Sent to GC will be populated with the current date.
- The new date detail field GC Complete Review Due Date will be populated with the value of the current date plus the configured offset

From this point forward, the existing functionality for e-Builder submittals is available and will function as normal (Send to Sub, Reply, Forward for Review, etc.)

New Date Detail Tracking Fields

As part of the enhancements 3 new date details fields were added to the submittal date details for tracking and reporting purposes:

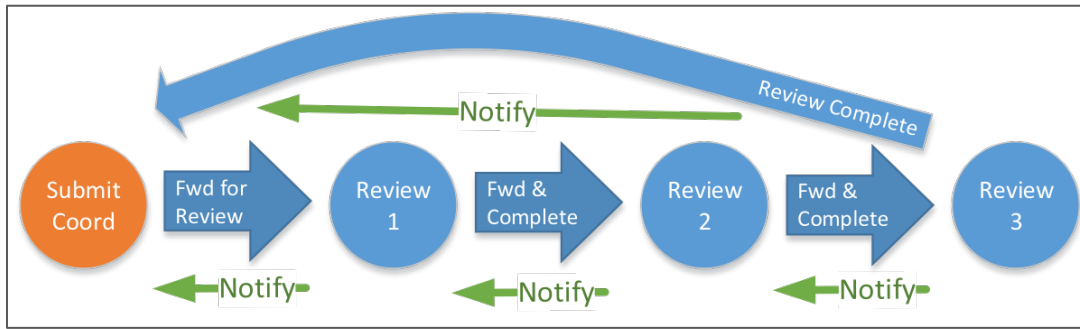
- Date Sent to GC: This records the date the subcontractor submitted the item to the GC
- GC Complete Review Due Date: This records the value of the date the item was submitted plus the configured offset in the project submittal settings.
Note: this date can be adjusted by the subcontractor when taking the Submit to GC action.
- Date Sent to Subcontractor: This records the date the item was last sent to the subcontractor using the Send to Sub action.

Notify Submittal Coordinator on Review Complete

In the current e-Builder submittal workflow, when an item is Forwarded for Review by the Submittal Coordinator, the original user who took the Forward for Review action will be notified when the person they forwarded to completes their review.

For customers who use a serial or daisy chain review process, this can present a challenge of knowing when an item that has gone through a serial review process has been completed.

E-Builder has added a new option, available in the Project Submittals Settings that notifies the Submittal Coordinator when a review that has been forwarded beyond the initial set of reviewers has been completed. With this option enabled, the Submittal Coordinator will receive a notification when all forwarded reviews for a submittal item have been completed.



To enable this feature simply select the new option on the project level submittals settings page at Project Menu >> Submittals >> Settings

Notify Submittal Coordinator on Review Complete: ?	<input type="checkbox"/>
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Cashflow

We have enhanced the Cashflow screen to be consistent with other areas of e-Builder for managing cost. You will find that the Cashflow screen now supports grouping by account codes, including the display of a summary or subtotal line.

Planning Forms Processes Documents Calendar Contacts Cost Schedule Reports Setup +

Cost Summary | Items Pending Approval | Unfinished Drafts | Data Entry

Project Cash Flow For ATN - New Builds - ATN-Campus (5/6)

Cash Flow Summary Previous Cash Flows Setup Cash Flow Update Cash Flow

Project: ATN-Campus (5/6)
 Current Cash Flow: Projections starting Aug 2018, last modified by Michael Dahm on 08.07.2018
 Description: Final May 2018 Cash Flow Update - Campus

Quick Cost Summary

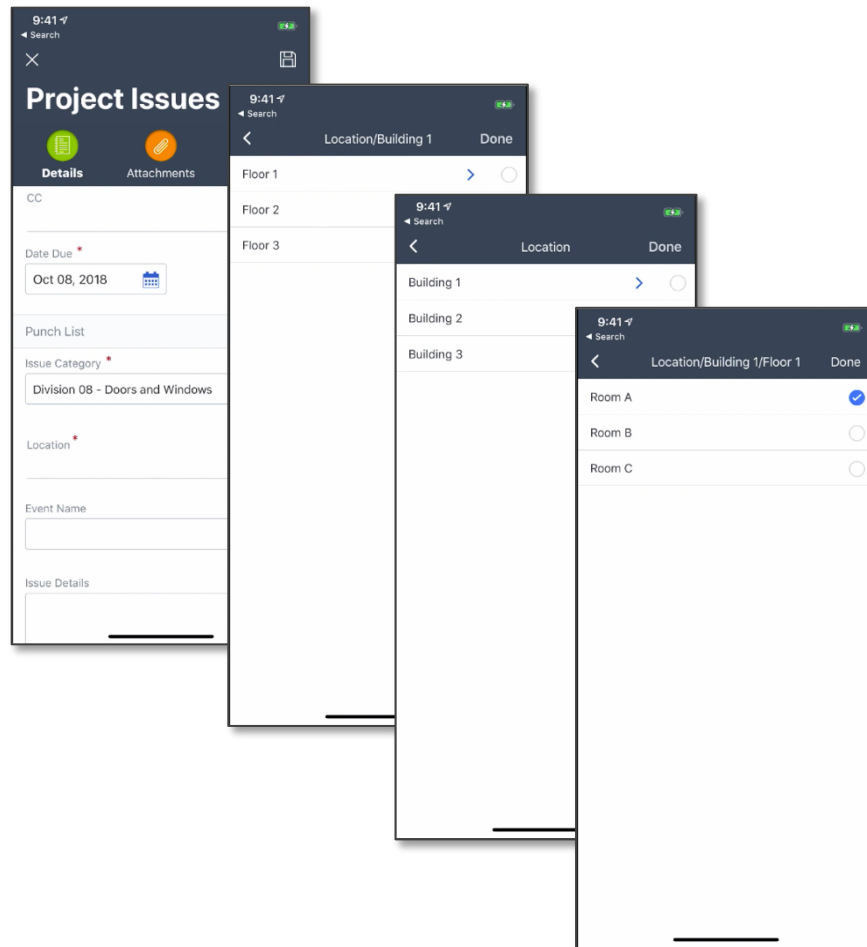
Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Forecasted Over/(Under)
	40,699,227.54	34,591,747.42	106,107,480.12	14,721,322.95

Current Cash Flow Expand All Collapse All Group By: Category Show all previous months

Line Item	Description	Projected Budget	Projected Commitments	Estimate at Completion	Actuals To Date	Actuals + Projections	Sep 2018	Oct 2018	Nov 2018	Dec 2018	Jan 2019	Feb 2019
100	Real Estate	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
200	Soft Costs	(3,993,891.00)	862,183.54	(3,761,300.73)	324,400.77	(3,827,943.21)	58,689.69	58,689.69	58,689.69	58,689.69	58,689.66	
300	Hard Costs	119,740,976.46	134,000,000.00	112,912,425.74	29,394,125.31	70,747,160.03	4,998,189.00	4,397,698.00	2,612,809.00	2,232,642.00	2,538,129.00	2,111,111.11
340	Network Infrastructure	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
350	Substation Construction	6,148,000.00	5,833,985.00	5,833,985.00	4,872,777.34	5,673,783.74	160,201.28	160,201.28	160,201.28	160,201.28	160,201.28	160,201.28
350.000	Substation & Transmission Line	6,148,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
351.000	Substation HV Equipment (TxFMR, MSG, HV/S)	0.00	5,833,985.00	5,833,985.00	4,872,777.34	5,673,783.74	160,201.28	160,201.28	160,201.28	160,201.28	160,201.28	160,201.28
353.000	Utility Transmission	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
358.000	Temporary Utility Consumption	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
360	DCC	0.00	0.00	27,644,248.59	0.00	16,662,497.04	961,145.20	961,145.20	961,145.20	961,145.20	961,145.20	961,145.20
390	Miscellaneous	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
400	OFE	0.00	3,059.00	3,059.00	444.00	444.00	0.00	0.00	0.00	0.00	0.00	0.00
900	Contingency	6,016,009.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	Schedule Percent Complete	127,911,094.65	140,699,227.54	142,632,417.60	34,591,747.42	89,255,941.60	6,178,225.17	5,577,734.17	3,792,845.17	3,412,678.17	3,718,165.14	3,111,111.11

Mobile Client

The latest release of the e-Builder Mobile Client for iOS has been enhanced to support Forms using Project Issues and Project Issue Locations. If you have forms configured for Project Issues and have setup Project Issue Locations on your project, users can now access and set the Location field when completing a Project Issue from the mobile client.



Single Sign On

e-Builder offers an add on solution to enable single sign on using an existing and supported Identity Provider. As part of the Q3 Enhancement Release, e-Builder has extended the Single Sign On solution to support Service Provider Initiated SSO (SP-Initiated SSO). This is in addition to the current support for Identity Provider Initiated SSO (IdP-Initiated SSO). Existing SSO customers interested in leveraging SP-Initiated SSO, or customers who would like to add the e-Builder SSO option may contact their Account Manager for more information.