



e-Builder Enterprise Q3 Release Notes

September 19, 2013



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Introduction

Investing in software requires trust. Trust in the vendor. Trust in the product. Trust in the training.

Recognizing the trust placed upon us, we believe that providing the easiest-to-use and most functionally-rich construction program management software is a must. But, it goes beyond. We must also deliver enterprise-class solutions to meet enterprise-class requirements.

What are enterprise-class solutions? Enterprise-class solutions provide the functionality, technology and security to meet the strictest demands of the largest organizations, yet the ease-of-use necessary for people at all experience levels. Simple to define. Serious business to deliver.

e-Builder has invested millions of hours into developing e-Builder Enterprise™ into the enterprise-class construction program management our clients deserve. The e-Builder Q3 2013 Enhancement Release extends that investment even further.

Product Enhancements

Electronic Signatures

We have added the ability to electronically sign documents to e-Builder Enterprise™. This new feature will help to eliminate the costly printing and cumbersome handling associated with obtaining physical signatures. Hundreds of signatures can be required during a project's lifecycle, such as when a signature is required on a submittal being sent to the Architect, and the cost associated with these transactions can amount to a significant expense.

e-Signatures streamlines the document review and approval process by allowing you to route PDF documents for digital signatures within an existing or new workflow process. Signed documents are then saved in the e-Builder Documents module. Using the third-party digital signature software application, DocuSign, all electronically signed documents will be ISO 27001 certified and legally binding in the United States and in 187 other countries. A DocuSign license is required to use Electronic Signatures.

e-Builder's Electronic Signatures enables secure document review, acceptance, archiving and publishing. More importantly, it retains the integrity of the workflow process by keeping all activity within the system and eliminating the need for hard-copy signatures.

For information and instructions on using e-Signatures, see About Electronic Signatures in the e-Builder Online Help.



Document Stamps

e-Builder Enterprise™ is now equipped with electronic document stamps. Physically stamping documents can be time-consuming and costly, but necessary none-the-less. Document stamps are often needed to physically mark permits, drawings, submittals and payment applications. Without an electronic source to complete these tasks, these documents have to be printed, routed by mail or fax and sent back to the sender.

Now, with e-Builder's Document Stamps feature, system administrators can upload image files to be used as a stamp on any PDF document. After stamps are loaded, permissions can be set for each one. A list of preloaded stamps will appear when a document is opened and users will have the ability to drag and drop stamps onto their files.

For more information and instructions on uploading stamps, see About Document Stamps in the e-Builder Online Help.

Risk Management Best Practices

Unmanaged risk is often the reason projects don't unfold as planned. Risk cannot be eliminated, but it can be minimized through the proper risk management process. A best practice guide for managing risks has been published in the e-Builder Community. When implemented, the process empowers owners to proactively manage risks and significantly improve project outcomes.

The e-Builder Enterprise Risk Management process provides a structured framework for efficiently managing the data, process, analysis and decisions necessary for effective risk management. It allows you to actively manage risk by engaging your best resources to reduce a threat or capitalize on an opportunity.

Cross-Browser Compatibility

e-Builder Enterprise™ is now cross-browser compatible. This means that all system functionalities will work as expected with the exception of one – viewing and redlining .dwg files is only supported in IE. All other system functionalities will work as expected in:

- Firefox®
- Chrome™
- Safari®
- Internet Explorer® versions 7 – 10, not including Metro.

This makes e-Builder Enterprise™ browser independent and affords you the convenience of working in your preferred browsers.

Submittals

A well-managed submittals process ensures that the owner receives what they require and minimizes the work involved in submitting and approving the documentation, such as cut sheets, shop drawings, products specs and samples. A poorly managed process creates additional work, delays projects, confuses everyone involved and limits successful project outcomes.

e-Builder Enterprise Submittals is a comprehensive tool enabling owners, general contractors, architects, engineers and others to successfully manage the entire submittals process. Using electronic information routing and reminders, e-Builder Enterprise Submittals ensures prompt responses and mitigates unnecessary delays by tracking which packages are late and who's holding up the process. Owners can use this real-time information to proactively address potential risks. Using e-Builder Enterprise Submittals will strengthen project team member collaboration and eliminate costly project delays.

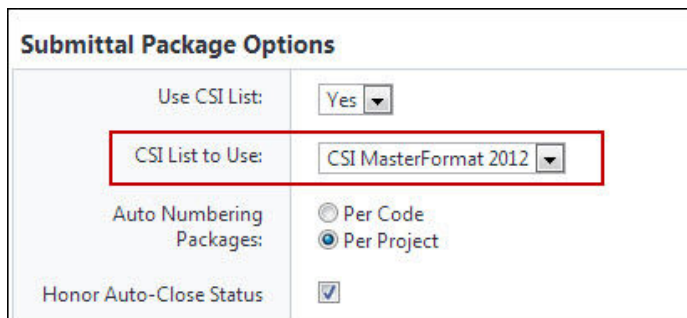
More than 1,000 development hours have been invested into the Q3 enhancements for e-Builder Enterprise Submittals. These enhancements make it easier for everyone working with submittals to do their job. This is especially true for your Architects, Engineers and Contractors. As vital members of your extended construction team, it is important that they can quickly build, share, review and approve submittal packages. With that as our goal, we worked with our clients to identify the enhancements included in the Q3 Enhancement Release.

Apply CSI Code Preferences per Project

Because different Architect/Engineers use different CSI divisions when working on submittal packages, we no longer require that all projects use the same CSI Codes. It is now possible for Administrators to set a CSI Code preference per project. A default account setting can still be configured, but Administrators have the option of changing this setting on the project level. Project preference options are:

- Use CSI List
- CSI List to Use
- Auto Numbering Packages

These enhancements enable you to see A/E's preferred list and achieve adoption from outside parties.

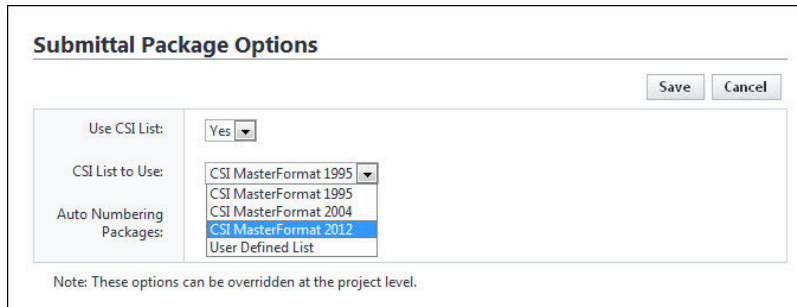


The screenshot shows a form titled "Submittal Package Options" with the following fields:

| | |
|--------------------------|--|
| Use CSI List: | <input type="checkbox"/> Yes |
| CSI List to Use: | <input type="text" value="CSI MasterFormat 2012"/> |
| Auto Numbering Packages: | <input type="radio"/> Per Code <input checked="" type="radio"/> Per Project |
| Honor Auto-Close Status | <input checked="" type="checkbox"/> |

Updated CSI Master Format List

The CSI Codes have been updated to include 2010 and 2012, so that our users have the most recent list to work with when selecting submittal package codes and bidding construction codes.



The screenshot shows a dialog box titled "Submittal Package Options". It contains the following fields and controls:

- Use CSI List:** A dropdown menu with "Yes" selected.
- CSI List to Use:** A dropdown menu with "CSI MasterFormat 1995" selected.
- Auto Numbering Packages:** A list box containing "CSI MasterFormat 1995", "CSI MasterFormat 2004", "CSI MasterFormat 2012" (highlighted in blue), and "User Defined List".

Buttons for "Save" and "Cancel" are located in the top right corner. A note at the bottom states: "Note: These options can be overridden at the project level."

Add Items after Package has been Routed

General Contractors now have the ability to add an item to a package that has already been sent to the Architect/Engineer. It is not uncommon to discover additional submittal items that should have been in a package that has already been routed to the Architect, so this enhancement supports this scenario.

Copy User Name Order

When copying users in a submittal package, user names are now listed in last name, first name order. This new format is consistent with how names are displayed throughout other areas of the product.

Download Multiple Documents at Once

While accessing submittal packages and submittal item attachments, General Contractors, Architect/Engineers and external project participants are now able to select more than one file to download at once. Previously, only a single document could be downloaded at a time, which could be a tedious process when working with a large number of files.

Option to Automatically Close Approved Submittals

A project setting has been added to give Account Administrators the option to automatically close approved submittal items based on the status of the submittal. The lack of auto close previously would force Contractors to perform additional steps in a process that might be deemed complete as of the submittal being approved. Items requiring revision cannot be auto-closed.

Submittal Register Options

Status Options | Category Options

Add New Status Add Cancel

* Status:

Requires Revisions:

Description:

* Prefix:

For Record Only:

Auto-Close Status:

Statuses Manage Package Status Use Defaults Delete

| | <input type="checkbox"/> Status Name | Description | Prefix | Req. Rev | For Rec. Only | Auto-Close Status |
|---------------|--|-------------------|--------|-------------------------------------|-------------------------------------|-------------------------------------|
| Edit Delete | <input type="checkbox"/> Approved | Approved | APP | | | <input checked="" type="checkbox"/> |
| Edit Delete | <input type="checkbox"/> Approved As Noted | Approved As Noted | AAN | | | |
| Edit Delete | <input type="checkbox"/> For Record Only | For Record Only | FRO | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Edit Delete | <input type="checkbox"/> On Hold | On Hold | ONH | <input checked="" type="checkbox"/> | | |
| Edit Delete | <input type="checkbox"/> Rejected | Rejected | REJ | <input checked="" type="checkbox"/> | | |
| Edit Delete | <input type="checkbox"/> Revise & Resubmit | Revise & Resubmit | RAR | <input checked="" type="checkbox"/> | | |

Submittal Package Options

Use CSI List:

Auto Numbering Packages:

Per Code

Per Project

Honor Auto-Close Status

Project Name Added to Submittal Settings Page

The project name has been added to the Submittal Settings page to be consistent with other pages in the e-Builder Enterprise™.

Routing Items within a Submittal Package

You now have the ability to route individual items within a submittal package. Now, when one or more approved items are included in a submittal package, they can move through the system without waiting for all items within that package to be approved.



Show Document Properties on Attached Documents

The properties of submittal attachments are now visible so that you can determine the folder that attachments are saved in at a glance. If action items need to be taken on a file, this enhancement allows you to see exactly where files are located.

Update Multiple Submittal Item Statuses at Once

Submittal Coordinators can now update the submittal status for more than one item at a time. This offers the opportunity to apply a single comment to all updated submittal items. In cases where there are a large number of items in a single submittal package, it can be frustrating and time-consuming to update each item individually. This enhancement significantly reduces the time it takes to update submittal items.

Visibility of Tooltip Icon

On the Submittal Register, the tooltip icon will only be visible if the Administrator has included a description for the submittal item. Previously, the icon was visible whether there was a tooltip or not. This enhancement offers a clear indication to users whether or not instructions are available for submittal items.

Usability Enhancements

Admin Tools:

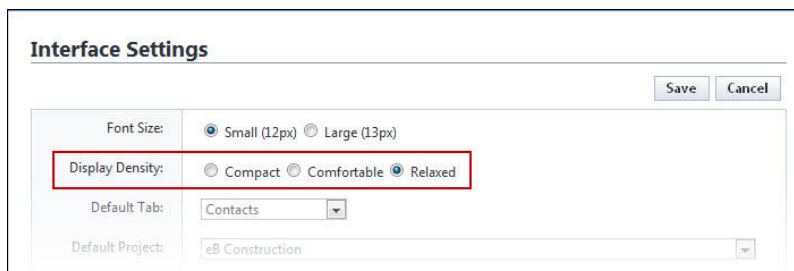
Creating User/Contact

When creating a new user, Administrators now have the ability to create a new Contact or add them to an existing contact in the process. In addition, Admins can add an existing user as a contact or create a new user from an existing contact. Previously, creating a new user manually when the person was already a contact introduced the potential for data entry errors. To support this feature, a Contacts tab has been added to the User Details page and lists all contact associations that the user has.

Increase/Decrease Line Spacing

Users now have the ability to determine the amount of space that is shown between fields. The amount of white space between fields was problematic when printing, which resulted in the creation of multiple pages, unnecessarily.

Three different line density options have been added to the Setup > Preferences > Interface Settings page. You can now choose from 1) Relax, 2) Comfortable, and 3) Compact. Relax is the default setting. This enhancement allows you to customize the view of the interface based on personal preference.



The screenshot shows the 'Interface Settings' dialog box. It has a title bar with 'Interface Settings' and 'Save' and 'Cancel' buttons. Below the title bar, there are four settings:

- Font Size: Small (12px) Large (13px)
- Display Density: Compact Comfortable Relaxed
- Default Tab:
- Default Project:

Remembering Document Destination Folders

When uploading multiple documents during a single session, the destination folder will now be remembered based on the area of the product the file was uploaded to. For example, the destination folder for process attachments, form attachments or documents attached to cost entities will be remembered independently of each other within a single session. You no longer have to reselect the same folder with each file upload.

Restricting View Permissions on Custom Fields

Administrators are now able to restrict the roles that have access to custom fields. This enables you to add custom fields that are sensitive to your organization while withholding them from the view of external project participants. If the restriction is set, it will be honored in Reports, Mail Merges and Imports.

Permission: Admin Edit Only

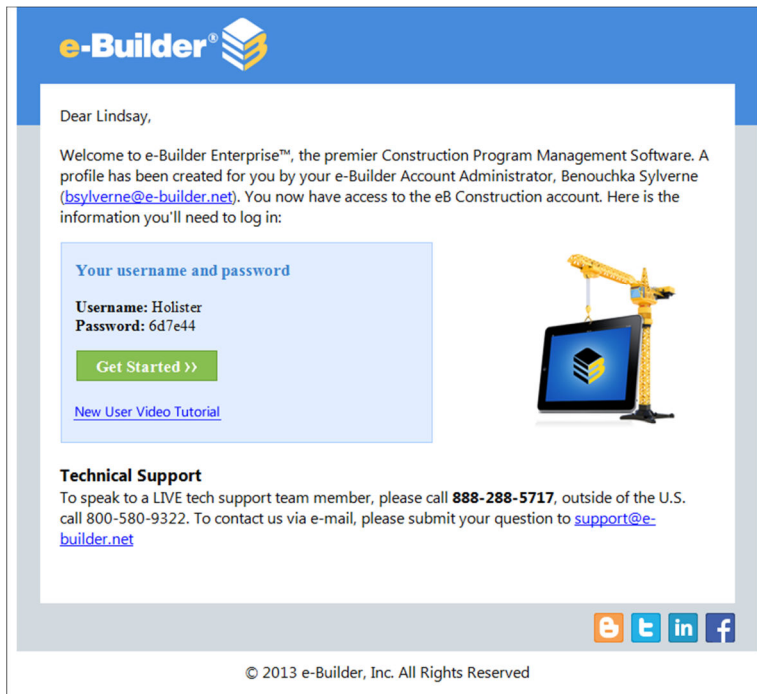
All Users View Edit

| Role Name | <input type="checkbox"/> View | <input type="checkbox"/> Edit |
|--------------------|-------------------------------------|-------------------------------------|
| Architect/Engineer | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Copy Editor | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Cost/Budgeting | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Equipment Managers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| General Contractor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Project Manager | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Resource | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Schedule Manager | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

checked Edit check

Updates to the New User Welcome Message

The welcome message to new e-Builder users has been revamped to include more detail about the company and increase its aesthetics. These updates will give new users a better overall first impression of e-Builder.



e-Builder

Dear Lindsay,


Welcome to e-Builder Enterprise™, the premier Construction Program Management Software. A profile has been created for you by your e-Builder Account Administrator, Benouchka Sylverne (bsylverne@e-builder.net). You now have access to the eB Construction account. Here is the information you'll need to log in:

Your username and password

Username: Holister
Password: 6d7e44

[Get Started >>](#)

[New User Video Tutorial](#)



Technical Support
To speak to a LIVE tech support team member, please call **888-288-5717**, outside of the U.S. call 800-580-9322. To contact us via e-mail, please submit your question to support@e-builder.net

[e](#) [t](#) [in](#) [f](#)

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Viewing Report Subscriptions from Central Location

Administrators are now able to see the report subscriptions of all users from a single location. Previously, to determine which team members had report subscriptions and to which report, Administrators would have to access each individual user record from the Subscriptions – Reports page, and this was time consuming.

Admins can now access and manage the report subscriptions for multiple team members from this page. A filter is available and allows you to narrow your results by user and/or report name. From here, Admins can also enable/disable, edit and delete user report subscriptions.

Before

Subscriptions - Reports

Scheduled Reports For Winsor, Chris Only Show Users In Role: All Users Winsor, Chris Add Scheduled Report

| Name | OutputType | Schedule | Next Run Time | Last Run Time | Last Result Status | DeliveryType |
|------------------------|------------------|----------------------------|---------------|---------------------|--------------------|--------------|
| Case 00034059 extended | Excel Print View | Once on 08.12.2011 11:00AM | Never | 08.12.2011 10:52 AM | Success | Email |

Add Scheduled Report

After

Subscriptions - Reports

Show only reports for user: All Users Please select a user...

Group By: Show Filter

| | Name | Subscriber | Report Name | Output Type | Schedule | Next Run Time | Last Run Time | Last Result Status | Delivery Type | Additional Recipients |
|-------------------------|-----------------------------------|-------------------|-----------------------------------|------------------|----------------------|---------------------|---------------------|--------------------|---------------|-----------------------|
| Edit Delete Enable | Available to Activity Manager | Sylvre, Benouchka | Available to Activity Manager | Excel Print View | Disabled | 02.28.2013 03:18 PM | 02.21.2013 05:15 PM | Success | Email | 0 |
| Edit Delete Enable | Available to All Users | Friedland, Tonka | Available to All Users | HTML | Disabled | 02.28.2013 03:18 PM | 04.06.2011 07:30 PM | Success | Email | 0 |
| Edit Delete Enable | Available to Resource Role Report | Friedland, Tonka | Available to Resource Role Report | HTML | Disabled | 02.28.2013 03:18 PM | 04.06.2011 07:30 PM | Success | Email | 0 |
| Edit Delete Enable | Tonka's Report | Friedland, Tonka | Tonka's Report | HTML | Disabled | 02.28.2013 03:18 PM | 04.06.2011 07:30 PM | Success | Email | 0 |
| Edit Delete Disable | User Log | Wiley, Mathia | User Log | Excel Print View | Every Day at 11:15AM | 08.16.2013 11:15 AM | 08.15.2013 11:15 AM | Success | Email | 0 |

Cost:

Account Code Free Text

On the Manage Account Codes page, clearing the check box for 'Use Drop-Down List' will effectively make the account code field available for free-text entry.

Manage Account Codes

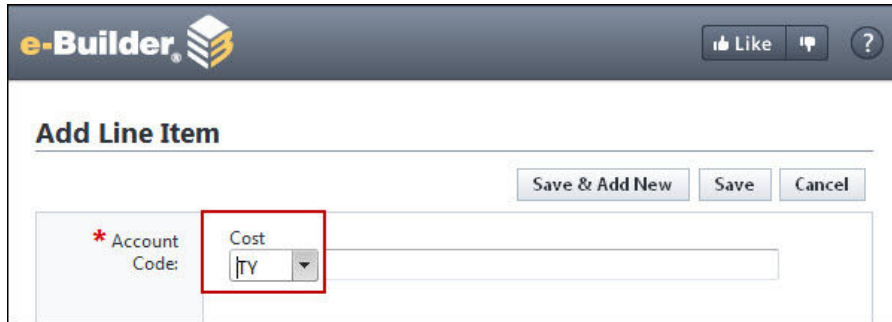
Preview Account Code Save

Sample Budget Line Item: 0000

Account Code Segment 1 Enabled

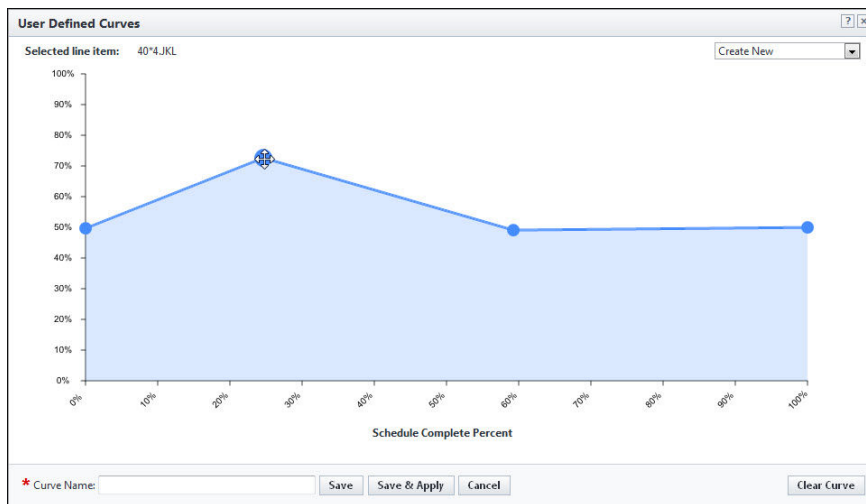
| | | | |
|----------------------|----------|-------------------------|-------------------------------------|
| * Segment Name: | Division | Display: | <input checked="" type="checkbox"/> |
| * Length: | 5 | Use Drop Down List: | <input type="checkbox"/> |
| Separator Character: | n/a | Drop Down List Options: | n/a |

This field is available on any page that requires users to select a line item, such as the Add [Budget] Line Item page.



Adjustments to Visual Cash Flow Curves

Standard cash flow curves are available in e-Builder Enterprise™ (Linear, Bell Curve, Inverse Bell Curve, S Curve and Inverse S Curve), and although these are widely used and accepted, we've extended the flexibility of the cash flow feature by adding the ability to define your own cash flow curves. While updating the cash flow, you can now define the curve you wish to apply by selecting and dragging the points on a line graph and adjusting the points to suit your needs.



For more information on creating custom cash flow curves, see [Define Custom Cash Flow Curves](#) in the e-Builder Online Help.

Budget Import – Approval Required for Change


While importing a budget template or budget line items, you can also include the 'Approval Required for Change' setting, which will allow you to determine whether or not approval is required for changes to specific line items. This enhancement keeps the budget import current with product developments.

Dynamic Cost Column – Select Dynamic Commitment Item

Dynamic commitment items can now be selected when creating dynamic cost columns. Dynamic commitment items can be used in a number of different ways, including currency conversion. For more information, see [Dynamic Cost Management](#) in the e-Builder Online Help.

Net Zero Adjustments

An 'Adjusted Amount' field has been added to the Change Details page for Budget and Commitment changes. This field exposes the amount of money that was actually moved in a net-zero change. Previously, there was no way to see the adjusted amount. This field can be pulled into reports, formulas and conditional branch process steps.

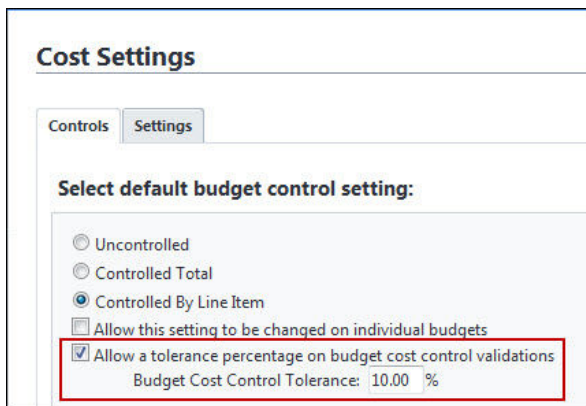


The screenshot shows the 'Commitment Change Details' page. It includes a 'Mail Merge' button and a table of details:

| | |
|--------------------|---|
| Project: | eB Construction |
| Commitment: | 001 - Land Aquisition - Fees and Services |
| Change Number: | 007 |
| Reason Code: | Owner Directive |
| Applies To: | Approved Changes |
| Description: | |
| Adjustment Amount: | 100.00 |

Tolerance on Cost Control Violations

Administrators are now able to allow a certain percentage above the budget to be paid out before the cost control violation is triggered. This feature may be necessary if it's an acceptable or common practice to pay on an invoice up to a certain percentage above the line item amount. This will be the default across all projects, but it can be changed per project on the Add/Edit Commitment Page.



The screenshot shows the 'Cost Settings' page with the 'Settings' tab selected. It features a section for 'Select default budget control setting:' with the following options:

- Uncontrolled
- Controlled Total
- Controlled By Line Item
- Allow this setting to be changed on individual budgets
- Allow a tolerance percentage on budget cost control validations

The 'Budget Cost Control Tolerance' is set to 10.00 %.

Documents:

Document Folder Permission Updates

It is now easier to update the folder structure of large projects. The entire folder structure can be exported, and then reimported into e-Builder in order to update project documents. In addition, the look and feel of folder permissions has been updated to make it easier to view and manage these permissions.

Before

After

| Group, Role, or User | View | Download | Redline Markup | Modify | Create | Create Folder | Delete | Change Perms | No Access |
|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| 2013 - Q3 Enhancement Project / Administrators | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 2013 - Q3 Enhancement Project / Members | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Drag and Drop Files into e-Builder

Note: This feature is only compatible with IE10, Firefox®, Chrome™ and Safari®.

You now have the ability to drag and drop multiple files directly into e-Builder without having to first click the Upload link. This makes uploading files more convenient and less time consuming. Please note that you cannot drag and drop folders; only files. Folders can only be uploaded using IE via the upload link in the multi-file upload tool. This enhancement affects three tasks in particular:

- Uploading Documents in the Documents Module
- Attaching Documents

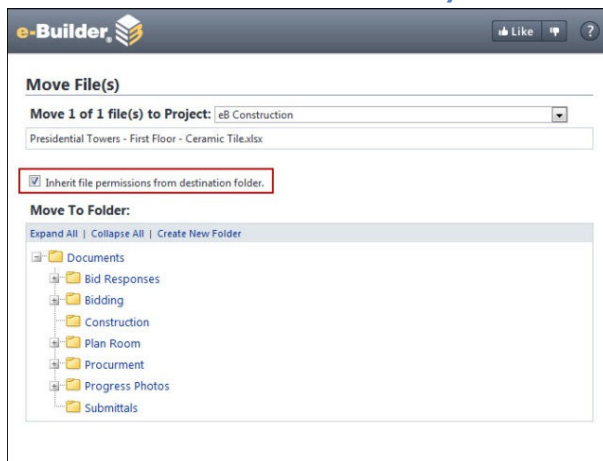
Uploading Documents in the Documents Module

Drag and drop files directly onto the Content Pane where files are listed.

Attaching Documents

Throughout e-Builder Enterprise™, drag and drop files onto the Attach Documents tab. If a default folder is not configured, you'll be required to select a folder.

Inherit Parent Folder Permissions by Default



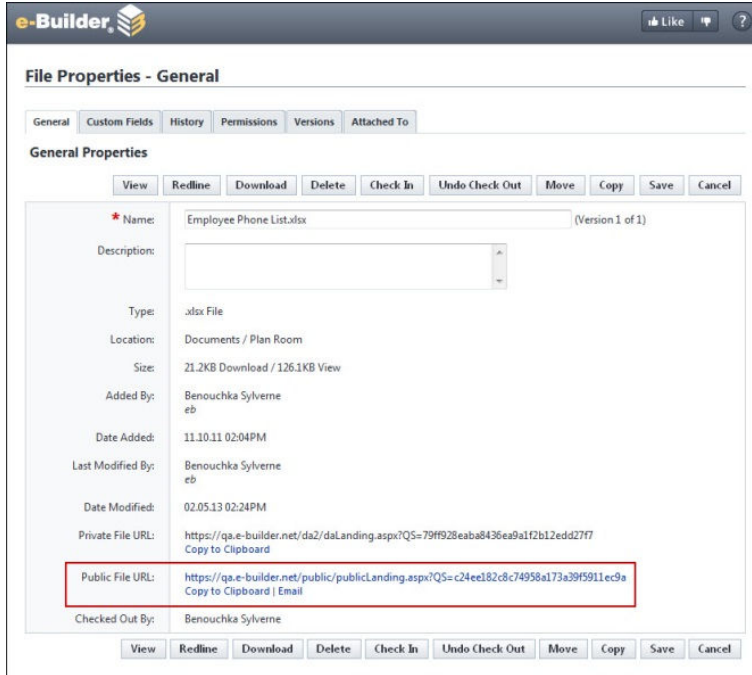
Currently, you can specify whether or not folder contents inherit the permissions of the folder. This option is now the default setting.

When moving files between folders, they will automatically inherit the permissions of the destination folder. Previously, this option would have to be selected for each file being moved. This enhancement coincides with the more practical use of this function.

For instructions on moving documents, see [Move Documents](#) in the e-Builder Online Help.

Public File URL

When a folder is enabled as a public folder, the files within the folder now have their own public file URL, which can be sent to recipients so that they can access the file directly. Previously, only the folder URL was available for distribution.



Upload Documents through Public Folder

In the folder properties you can now set the ability to allow uploading of documents through a public folder. This gives external users the ability to collaborate with team members while still restricting access to other areas of e-Builder. If recipients are not already logged in, they will be required to do so before they can upload documents.

Folder Properties - General

General | Custom Fields | History | Permissions | Subscribers | Recycle Bin | Public Access History

General Properties

Name: 04 Drawings

Description:

Document Type: User Choice

Location: Documents / 04 Drawings

Added By: Elissa Manso Support

Date Added: 09.03.13 02:24PM

Last Modified By: Elissa Manso Support

Date Modified: 09.03.13 02:28PM

Private Folder URL: <https://qa.e-builder.net/ds2/dsLanding.aspx?Q5=64643d7468d46cd842d07191b5b>
Copy to Clipboard

Public Folder URL: <https://qa.e-builder.net/public/publicLanding.aspx?Q5=6b26bd9f054a3093f4d6ecf3be5b28>
Copy to Clipboard | Email

Public Access Permissions:

- Require registration to access:
- Show public sub-folders on public view:
- Allow uploads to public folder:

Folder Access Options:

- Allow Fax In:
- Allow Email In:

04 Drawings

You must sign in to view the contents of this folder.

| | |
|--|--|
| <p>Already registered? Login below.</p> <p>Login</p> <p>Username: <input type="text"/></p> <p>Password: <input type="password"/></p> <p><input type="button" value="Login"/></p> | <p>Need to register?</p> <p>Register</p> <p>If you are a first-time user, please register for an e-Builder username and password.</p> <p><input type="button" value="Register"/></p> |
|--|--|

NOTE: Your registration information will only be used to track access to this public folder.
Email: info@e-builder.net Support: support@e-builder.net Phone: 954-556-6701 Fax: 954-792-5949

04 Drawings

| Name | Date Uploaded | Owner | Company |
|---|--------------------|--------------|---------|
| 2455 Family Rm. to Foyer.jpg (version 1) View Download (195.1KB) | 09.03.2013 02:29pm | Elissa Manso | Support |

Forms:

Determine who's Able to Close Form Instances

People are often changing roles within an organization and consequently, no longer need access to the information they previously did. As the initiator of a form you have full access to that form and are therefore able to close it at any time. A setting has been added to the Form Type Properties page that allows you to determine the parties that have the ability to close form instances. In the event that the form initiator switches roles and no longer needs access to the form instance, this setting allows you to restrict access and grant it to the appropriate parties.

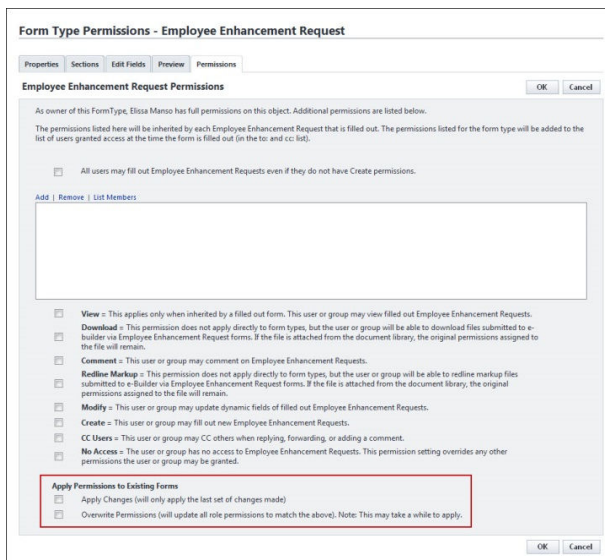
By going to the Form Type properties, Administrator can determine the user or roles that are able to close a form. In the field, 'Who Can Close Form?', administrators can choose from the following:

- 1) Form Initiator
- 2) Form Recipient
- 3) Specific Roles



Overwrite Form Type Permissions

Administrators now have the ability to overwrite form instance permissions to match the Form Type permissions. An option has been added to the form type permissions to overwrite existing instances. This gives Administrators the ability to reconcile permission inconsistencies and determine exactly which roles have access to different form types.



Updates to Manage Form Type Permissions

Administrators can now give users in the Administrator Role the ability to modify existing form types and create new ones. These users are also able to edit permissions on a form instance. Previously, only account administrators were able to do this.

In addition, the “Manage Forms” label located on the Manage Permissions page has been changed to “Manage Form Instances” to better clarify what this permission allows you to do.

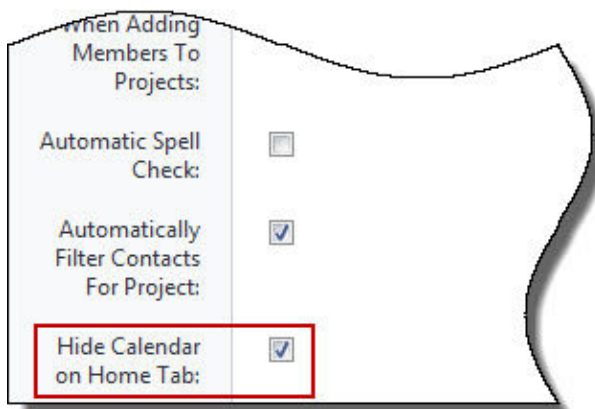
| Roles | | | | Save Changes |
|-------|------------------------|--------------------|---------|--------------|
| Role | Manage Form Instances* | Manage Form Types* | Import* | |

For instructions on adding roles to the Administrative Role, see [Add Roles to the Administrator Role](#) in the e-Builder Online Help.

Home:

Hide Calendar on Home Tab

Users can now hide the Calendar so that it does not appear on the Home tab. Doing so increases screen real estate and causes the Home tab to load more quickly. To enable this setting, go to Setup > Interface Settings > ‘Hide Calendar on Home Tab’ check box.



Processes:

Conditional Statement on Line Item Used

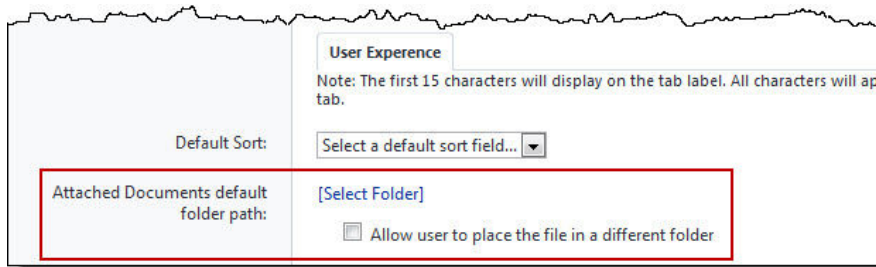
A setting has been added to require approval on budget changes. Line items with this setting enabled can be added to conditions in a process.

Copy Workflow and Layout Name

When copying a workflow, the name of the original workflow is also copied over with the word “Copy” appended to the end of it. This allows users to copy workflows and make only minor adjustments to the name if necessary.

Default Folder Path for Process/Cost Document Attachments

While managing process types, Administrators are now able to set a default folder path for all attached documents. You have the ability to decide whether or not default folders can be changed by team members during upload.



For more information about this settings, please see [Process Properties Tab Overview](#) in the e-Builder Online Help.

Document attachments have also be enabled on all Cost entities (Budget, Budget Changes, Commitments, Commitment Changes, and Actual Costs) in the Cost module to give users the ability to store additional data at different points of the fiscal process.

Commitment Change Details

[Mail Merge](#)
[Make Pending](#)
[Make Projected](#)
[Request Approval](#)
[Approve](#)
[Edit](#)
[Delete](#)

| | | | |
|----------------|-------------------------------|-----------------|---------------------------------|
| Project: | 2013 - Q3 Enhancement Project | Project Number: | 2013Q3 |
| Commitment: | 004 - North Wing Construction | Status: | Draft |
| Change Number: | 001 | Company: | CoreValues Engineering |
| Reason Code: | Error / Omission | Date of Change: | 09.05.2013 |
| Applies To: | Approved Changes | Created: | 09.05.2013 (Benouchka Sylverne) |
| Description: | | | |

Quick Cost Summary

| Current Budget | Current Commitments | Actuals Approved | Actual Cost To Complete | Projected Over/(Under) |
|----------------|---------------------|------------------|-------------------------|------------------------|
| 15,792,836.22 | 171,343.75 | 0.00 | 171,343.75 | (15,621,492.47) |

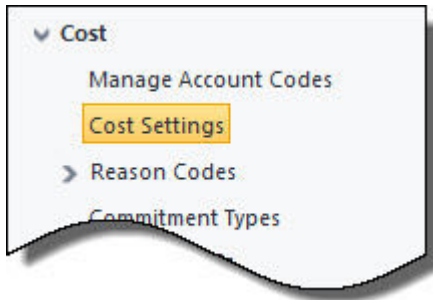
[Commitment Change Items \(0\)](#)
[Custom Fields \(0\)](#)
[Notes \(0\)](#)
[Documents \(0\)](#)
[Forms \(0\)](#)
[Processes \(0\)](#)

[Attach Documents](#)

| File Name | Attached By | Date Attached |
|--|-------------|---------------|
| There are no documents attached to this commitment change. | | |

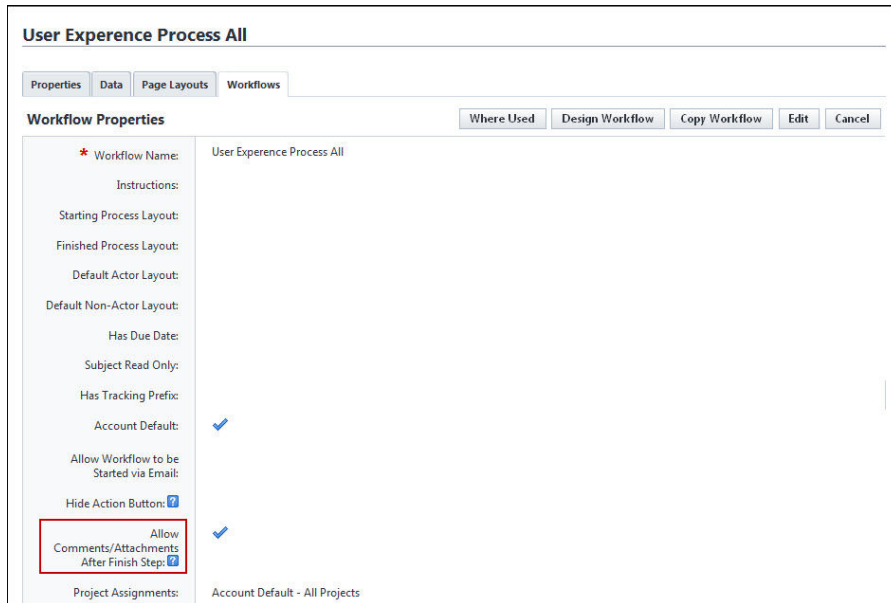
[Attach Documents](#)

Additionally, the “Cost Control” link in the Administration Tools section has been changed to “Cost Settings,” which is a more accurate description of the settings on this page.



Label Change on Finish Step

The field label, 'Allow Comments after Process Finish' has been updated to 'Allow Comments and Attachments after Process Finish.' This setting has always allowed comments and attachments after the process has ended, but the label did not convey this.



The screenshot shows the 'User Experience Process All' workflow properties dialog box. The 'Workflow Properties' tab is active, and the 'Allow Comments/Attachments After Finish Step' checkbox is checked and highlighted with a red box. Other properties include 'Workflow Name: User Experience Process All', 'Account Default: [checked]', and 'Project Assignments: Account Default - All Projects'.

Print Order of Automation Mail Merge

You are now able to determine the order of attached files in an automation mail merge step, instead of having the documents display in the order they were attached.

Processes/Reports:

Robust Formula Creators

A number of additional functions have been added to the formula builder to offer greater flexibility in creating data fields that are compatibility with the various third-party accounting systems utilized by our user base. The new functions include:

Processes

- "IFDate()" – allows you to determine the field assignment value based on a value of a date field.
- "Is Null Date" – allows you to determine if a date value is null and base the outcome on that value.

- "IsNull String" – allows you to determine if a string value is null and base the outcome on that value.
- "MinDate" – allows you to determine the minimum date value and determine the outcome based on that value.
- "MinNumber" – allows you to determine the minimum value and determine the outcome based on that value.
- "MaxDate" – allows you to determine the maximum date value and determine the outcome based on that value.
- "MaxNumber" – allows you to determine the maximum value and determine the outcome based on that value.

For more information and instructions on using these functions, see [Edit Conditional Branch Page Overview](#) in the e-Builder Online Help.

Reporting

- "IFString()" – allows you to determine the values that should be shown.
- "IFNumber()" – allows you to enter an integer value and determine the values that should be shown.
- "IFDate()" – allows you to enter a date value and determine the values that should be shown.
- "Is NullDate" – allows you to determine if a date value is blank and determine the value that should be shown.
- "Is NullString" – allows you to determine if a string value is blank and determine the value that should be shown.
- "MinDate" – allows you to determine the minimum date value and determine the outcome based on that value.
- "MinNumber" – allows you to determine the minimum value and determine the outcome based on that value.
- "MaxDate" – allows you to determine the maximum date value and determine the outcome based on that value.
- "MaxNumber" – allows you to determine the maximum value and determine the outcome based on that value.

For more information and instructions on using these functions, see [Formula Builder Page Overview](#) in the e-Builder Online Help.



User Details Reporting – License Types & License Expiration

Two new fields have been added to the User Details report type. You are now able to report on license types and expiration dates to better manage user licenses.

| User Information | | | | Select All Deselect All |
|--|---|---|---|---------------------------|
| <input type="checkbox"/> Account Expires | <input type="checkbox"/> Company Name | <input type="checkbox"/> Email | <input type="checkbox"/> Email Format | |
| <input type="checkbox"/> First Name | <input type="checkbox"/> Home Address | <input type="checkbox"/> Home City | <input type="checkbox"/> Home Country | |
| <input type="checkbox"/> Home Fax | <input type="checkbox"/> Home Phone | <input type="checkbox"/> Home State | <input type="checkbox"/> Date Added to Account | |
| <input type="checkbox"/> Home Zip | <input type="checkbox"/> Job Title | <input type="checkbox"/> Last Name | <input checked="" type="checkbox"/> License Expires | |
| <input checked="" type="checkbox"/> License Type | <input type="checkbox"/> Office Address | <input type="checkbox"/> Office Cell | <input type="checkbox"/> Office City | |
| <input type="checkbox"/> Office Country | <input type="checkbox"/> Office Fax | <input type="checkbox"/> Office Pager | <input type="checkbox"/> Office Phone | |
| <input type="checkbox"/> Office PO Box | <input type="checkbox"/> Office State | <input type="checkbox"/> Office Zip | <input type="checkbox"/> Personal Cell | |
| <input type="checkbox"/> Personal Pager | <input type="checkbox"/> Type of Business | <input type="checkbox"/> User Create Date | <input type="checkbox"/> User Department | |
| <input type="checkbox"/> User Last Logon | <input type="checkbox"/> User Name | | | |

e-Builder Mobile™ Usability Enhancements

Copy Forms and Processes on e-Builder Mobile™

The ability to copy forms and processes have been enabled on e-Builder Mobile™. This helps team members avoid having to enter similar data on a recurring basis when using the mobile app. Copying forms and processes is possible in e-Builder Enterprise, but now users with the proper permissions (*Create Form* type permissions and anyone that can start a particular process type) can also perform this task on the go.

Default Folder Path Honored in e-Builder Mobile™

In e-Builder Enterprise™, Administrators can now assign a default folder path for file data fields in processes. This default folder setting will also be honored in e-Builder Mobile™. If your Administrator has assigned a default folder path or allows users to change the default and select another folder, both settings will be applied in the mobile app.