



# Q4 2018 Release Notes

**JANUARY 18, 2019**

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## Q4 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. This release also includes a list of resolved cases for the past month.

### What's New

The following is a list of enhancements included in the release. If you have any questions regarding this release, please contact e-Builder [Technical Support](#).

#### Resource Management with Cost

e-Builder is excited to introduce Resource Loaded Schedules linked to the Cost module in real-time! We have augmented our new Schedule interface by adding a new Resource Management with Cost module to solve the following problems facing our clients:

- Need a simple way to accurately assess the organization's self-performance costs over time.
- Project Managers have no visibility into the Planned Hours of their professional and associated Costs on Task assignments. They often don't see such costs until after the charges are billed to their projects via Payroll Journal Entries.
- Project Managers face challenges in accurately forecasting their Resource Cost at Completion due to lack of visibility into their true Remaining Resource Costs.

The new Resource Management with Cost module solves these problems by providing clients with the ability to:

- **Capture accurate resource costs** – Easily and consistently capture accurate resource rates for staff, apply the labor burden, and then load resources onto tasks. Project Managers will not have to use “ballpark estimates” or “rule of thumb percentages” to assess self-performance costs any more.
- **Link resources or schedule tasks to budget line items** – At the project level, select whether to link schedule tasks or link resources to budget line items, and view real-time resource costs in the project Cost Summary.
- **Eliminate hidden soft costs** – With visibility of resource costs in the project Cost Summary, managers can evaluate their true available budget for external contracts.
- **Track remaining resource costs as payroll costs are entered** – As actual payroll costs are entered from the ERP system, remaining resource costs adjust accordingly, providing highly accurate total project cost at completion.

This new module is available at an additional cost. Please contact your Account Manager for pricing details.

## New “Manage Resources” page in Admin Tools\Schedule

**Administration Tools**

- > Automation
- > Calendar
- > Construction Codes
- > Contacts
- > Cost
- > Schedule
  - Master Processes/Tasks
  - Manage Resources**
  - Calendar Exceptions
  - > Custom Fields
  - Options
  - Schedule Templates
- > Submittals
- > Settings

**Manage Resources**

Resources Burden Roles

Add Save Cancel Import

	Name	ID	Type	Rates	Burden	Rate + Burden	Total Monthly Hours	Max Allocation	Active
Delete	ALAN...		Labor	\$25.72/h	\$57.93/h	\$83.65	176	100%	<input checked="" type="checkbox"/>
Delete	...	1198	Labor	\$32.17/h	\$72.46/h	\$104.63	176	100%	<input checked="" type="checkbox"/>
Delete	ALEXANDER, THOMAS D	1199	Labor	\$25.33/h	\$57.06/h	\$82.39	160	100%	<input checked="" type="checkbox"/>
Delete	ALVIN, CHRISTOPHER S	1199	Labor	\$44.82/h	\$100.96/h	\$145.78	176	100%	<input checked="" type="checkbox"/>
Delete	ALVIN, WILSON J	1199	Labor	\$48.73/h	\$109.76/h	\$158.49	176	100%	<input checked="" type="checkbox"/>
Delete	ANDREW, GARY M	1198	Labor	\$36.82/h	\$82.94/h	\$119.76	176	100%	<input checked="" type="checkbox"/>
Delete	ANDREW, LAWRENCE D	1199	Labor	\$36.73/h	\$82.73/h	\$119.46	176	100%	<input checked="" type="checkbox"/>

When Adding Resources, select any Account “Users” or “Create New Resources” (non-users)  
 Enter Pay Rate, Effective Date, Capacity (i.e. Work Days per month, Hours per Day, Max Allocation %)

**Add Resource**

\* Type: Labor

\* Name: Add New Resource (dropdown menu open with options: Add New Resource, Add from User)

\* ID:

Title:

Email:

Phone:

**Rates**

	Effective Date	Pay Rate	Apply Burden	Rate + Burden
		Default Rate \$0.00/h	<input type="checkbox"/>	\$0.00/h
Delete	Enter Date <input type="text"/>	\$0.00/h	<input type="checkbox"/>	\$0.00/h

**Availability**

Capacity  Work Days

Add Close

For any Project, Resource Costs may be linked to the Budget either by:

- Linking Tasks to Budget Line Item, or
- Linking Resources to Budget Line Item

**Create Schedule**

**General**

Project: Q4 2018 Resource Management Schedule

\* Manager Role: Please select... (dropdown menu open showing: Please select..., Acctng-Approval, Acctng-Bookkeeper, eB Admin, Project Manager, Schedule Manager)

\* Manager User: [Empty]

Use External Scheduler:

Automatically calculate the % complete [?](#)

Link Resource Cost to the Budget:  None,  Tasks to Budget Line Item,  Resources to Budget Line Item

### Multiple Project Calendars

There are 3 pre-defined Calendars with 3 different Work Weeks

- **Standard:** Monday to Friday (8 hours each day)
- **7 Day Week:** Sunday to Saturday (8 hours each day)
- **24 Hours:** Sunday to Saturday (24 hours each day)

*Additional Calendars can be added and may be selected for use on any Task in the Schedule*

**Manage Calendars**
✕

**Calendars**

Add Remove

24 Hours

7 Day Week

Standard

**Details**

October 2018

S	M	T	W	T	F	S
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Name:

Default Calendar:

**Working hours for Oct 4, 2018**

08:00 AM - 04:00 PM

Based On: Default work week on calendar "Standard"

Work days  
  Weekends  
  Exceptions

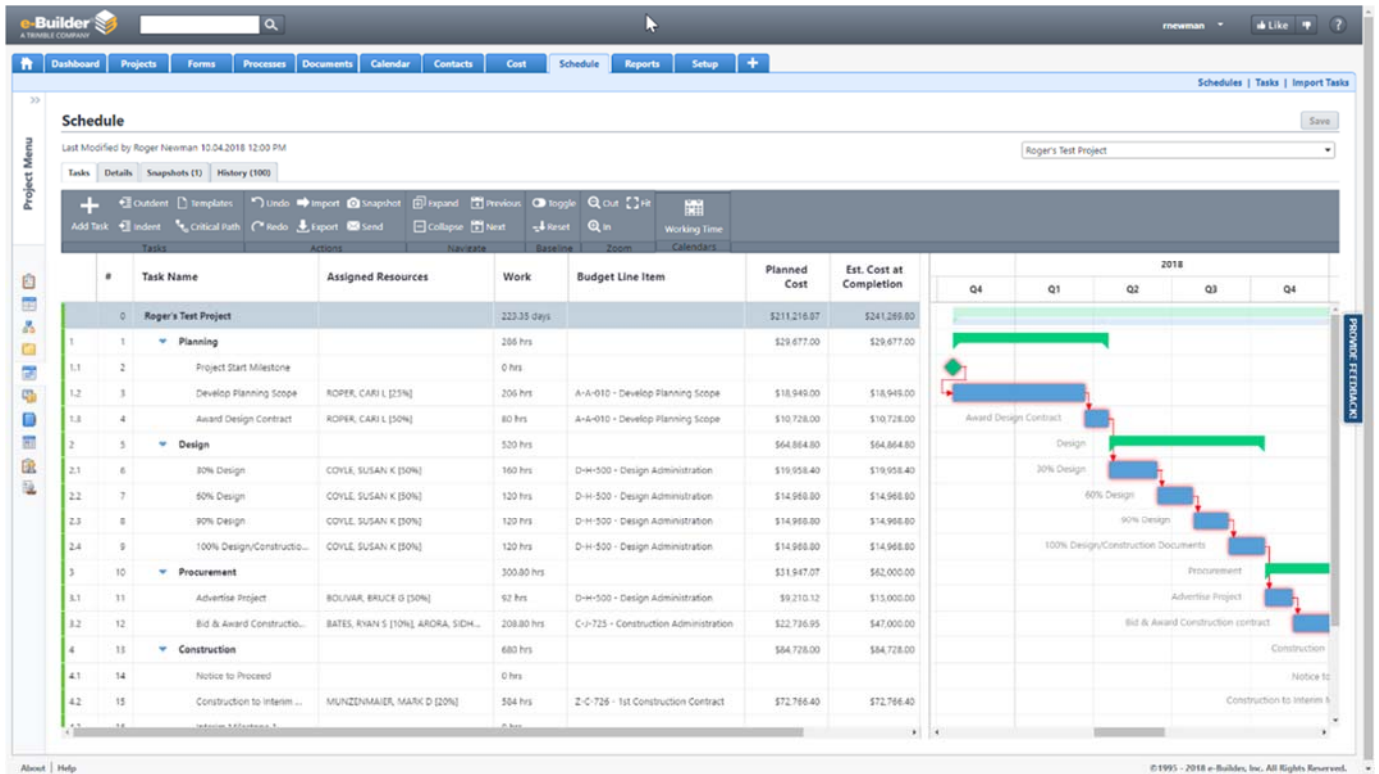
**Exceptions**

Name	Type	Start Date	Finish Date
09.04.2017	Non-Working	09.04.2017	09.04.2017
11.23.2017	Non-Working	11.23.2017	11.23.2017
11.24.2017	Non-Working	11.24.2017	11.24.2017
12.22.2017	Non-Working	12.22.2017	12.22.2017
12.25.2017	Non-Working	12.25.2017	12.25.2017
12.29.2017	Non-Working	12.29.2017	12.29.2017

Apply
Close

*Manage Calendars window*

## Schedule Gantt Chart with Assigned Resources and Links to Budget Line Items



Schedule Gantt – Tasks tab

## New “Total Resources Costs” Column

Once the resources or tasks are linked to budget line items and the schedule is saved, the new “Total Resource Costs” is visible in the Cost Summary page and updates in real-time to match the schedule.

Line Item	Description	B Approved Budget Changes *	C A + B Current Budget *	D Current Commitments *	E Projected Commitments	F Total Resource Costs	G Remaining Resource Costs
A-A-010	Develop Planning Scope	1,000,000.00	1,000,000.00	10,000.00	10,000.00	0.00	0.00
C-C-726	1st Construction Contract	0.00	0.00	0.00	0.00	0.00	0.00
C-J-725	Construction Administration	2,000,000.00	2,000,000.00	32,000.00	32,000.00	0.00	0.00
D-H-500	Design Administration	1,000,000.00	1,000,000.00	15,000.00	15,000.00	0.00	0.00
D-P-500	Design Administration	1,000,000.00	1,000,000.00	0.00	0.00	0.00	0.00
Z-C-726	1st Construction Contract	0.00	0.00	0.00	0.00	0.00	0.00
Z-H-500	Design Administration	0.00	0.00	0.00	0.00	0.00	0.00
Z-J-725	Construction Administration	0.00	0.00	0.00	0.00	0.00	0.00
<b>Totals</b>		<b>5,000,000.00</b>	<b>5,000,000.00</b>	<b>57,000.00</b>	<b>57,000.00</b>	<b>0.00</b>	<b>0.00</b>

*Real-time Total Resource Costs Column Updates in The Cost Summary Page*

## New Gantt Chart Columns

As part of the enhancements and available with Resource Management with Cost, new Gantt chart columns were added to resource management. See the Online Help for more information about the columns.

## Disallow Negative Budget Items or Negative Budgets

E-Builder has added the capability to prevent users from requesting approval and approving Budget Items or Budget Changes that will result in a negative Budget Value.

- If Budget Control is set to “**Controlled by Line Item**”, users will receive an alert when attempting to approve a Budget or a Budget Change that results in **any Budget Line Item Value < \$0.00**.
- If Budget Control is set to “**Controlled Total**”, users will receive an alert when attempting to approve a Budget or a Budget Change that results in the **Project Budget Value < \$0.00**.

To begin enforcing this new control on all transactions going forward, contact e-Builder’s [Technical Support](#) to set the new Account Attribute to “DisableNegativeBudget”.



## Formula Update for “Net Actuals Approved”

The formula on the cost summary column "Net Actuals Approved" has been updated. Previously, the formula did not consider retainage release amounts in the “Net Actuals Approved” column, while it was considered in the “Net Actuals Paid” column. This resulted in discrepancies between “Net Actuals Paid” and “Net Actuals Approved” following retainage release transactions.

The Net Actuals Approved formula has now been updated to include retainage releases.

Net Actuals Approved = Actuals Approved – Amount Retained + Retainage Released

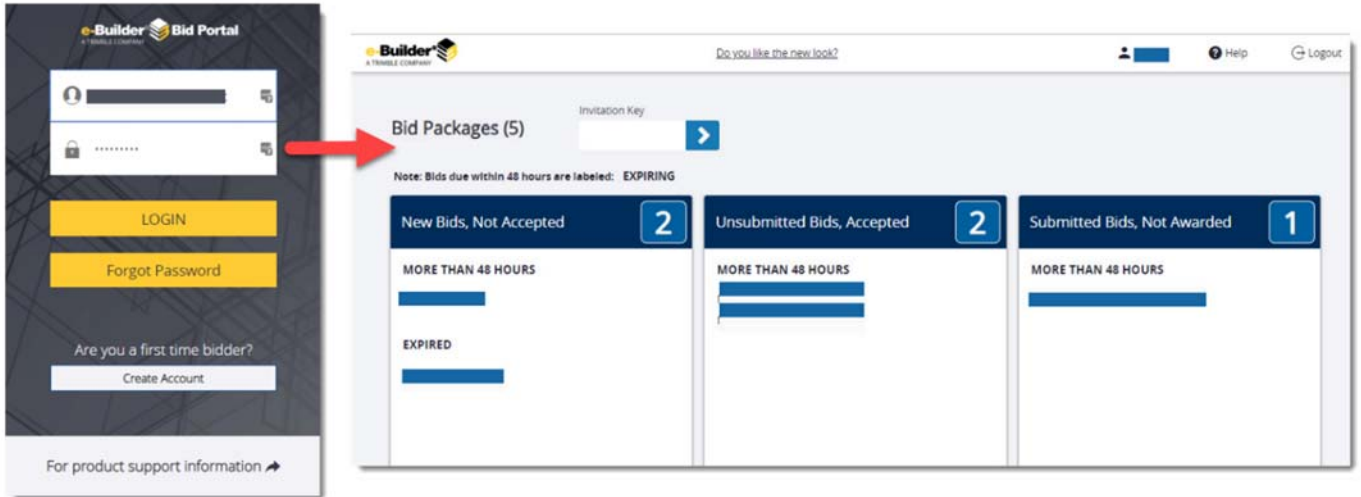
## Updated Bid Portal User Interface

The Bid Portal has been streamlined to ensure that all bidders have the timely information that they need to prepare competitive, accurate bids in high-stress environments. This includes the following updates:

- An updated user interface for the Bid Portal where the bid submitter’s key information is highly visible, and where the final bid takes only a few minutes to prepare and submit.
- A user interface that increases the confidence of the bid submitter that they are competing on an even footing with other bidders, and that their anonymity is protected.
- A user interface that clearly communicates the documents, addenda, and clarifications published by the bid manager to all bid submitters simultaneously.

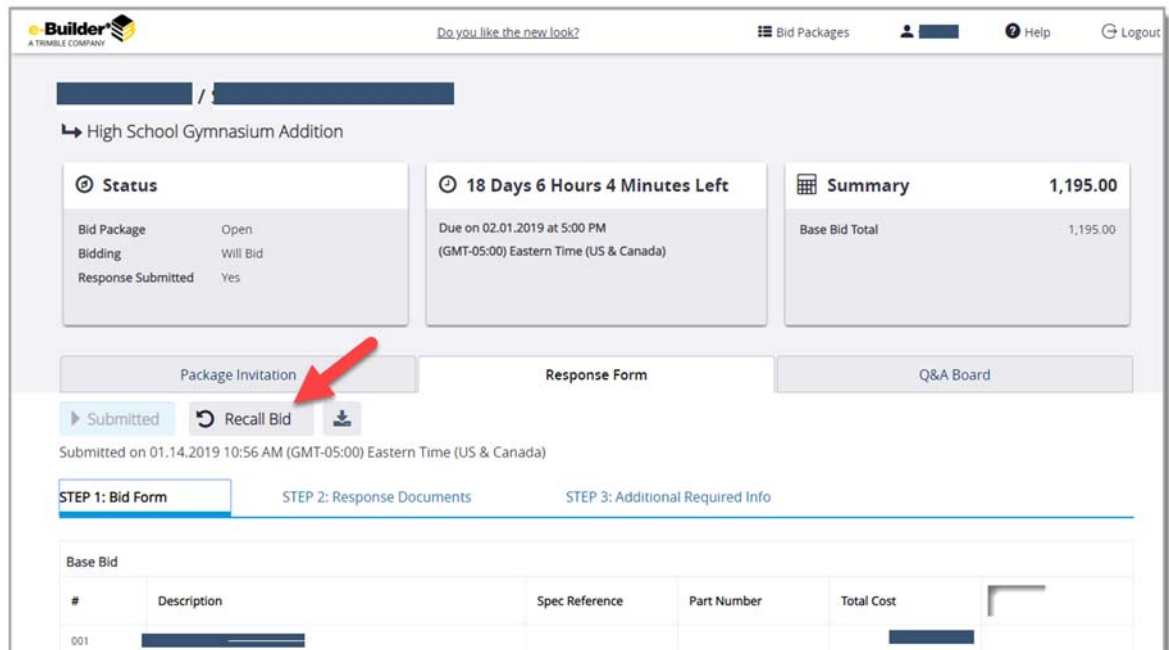
### *Considerations*

- The e-Builder Admin for each customer must contact [Technical Support](#) and request to activate the new interface.
- All bidders will encounter the updated Bid Portal login screen and main Bid Packages listing page. Once the bidder selects a bid package, e-Builder will present the new or legacy interface depending on whether the account setting has been activated.



### Updated Bid Portal User Interface

- Training: Watch a video that gives you an overview of the Bid Portal. A link is available for all bidders under “For Product Support Information” on the new login screen or go to <https://youtu.be/X0cc4qwJZLM>.
- **Recall Bid:** Only change in functionality. This feature allows bidders to recall, edit and resubmit their bid response at any time prior to the bid due date/time without requiring approval from the bid manager.



*New Interface for Bidders to Recall a Bid Response Before It Is Due*

### **Bid Package History – Pending Requests**

The Bid Package History tab now records the bid manager’s approval or rejection of pending requests for access to bid packages from uninvited bidders, or for re-opening bid packages.

### **“Create Submittal” Permission – Blocked from Hidden Items**

Hidden comments and attachments are intended to be viewable by the design team for submittal review conversations, and then selectively shown by the submittal coordinator to the construction team (typically using Create and Add/Edit submittal permissions). The new “Create Submittal” permission added in 3Q2018 was incorrectly able to view hidden items, and this has been fixed.

## Resolved Cases

The following is a list of resolved cases for the past month. If you have any questions regarding this maintenance release, please contact e-Builder [Technical Support](#).

### Companies/ Contacts

Case #	Resolution Notes
299917	A change was made for Process data fields, in particular- of types "Company" and "Company on Project". When a company is either NOT Active or has the "Do not use" checkbox unchecked, then the name of the company will not appear on the process instance while clicking on the lookup button for the data field. For a company to appear on the lookup, it must be either "Active" or has to have the "Do not Use" option not selected.

### Cost

Case #	Resolution Notes
291129	When importing a Cashflow Curve with less than 200 data points, the resulting curve was vaguely accurate to the intended curve. Now the curve matches the intended curve.
291622	Previously, the General Invoice Import didn't include each new invoice's cost against overall project current commitments causing commitments to exceed budget when the budget was controlled total. This has been corrected.
296406	Earlier, marking a budget approved while an Apply Template is running could cause the resulting Budget to not appear to have any items. Now the budget status is checked before applying cost summary changes to budget when applying a Template.
--	Controlled Total Master Commitments would not draw down Master Commitment Items beyond their amount causing Project Commitment Changes to increase the value of Master Commitment when the value of the Project Commitment Item exceeded the Master Commitment Item. This has been corrected and Master Commitment Items can now go negative with Controlled Total setting.

## Documents

Case #	Resolution Notes
297730	A browser-specific error was occurring when using IE11 and editing a notes field in a process, causing the changes not to save. This has been resolved.

## Forms

Case #	Resolution Notes
299880	The Form Types Properties Page had consistent slow performance. Code optimizations have resolved the performance issue.

## Processes

Case #	Resolution Notes
296051	The "Last Modified Date" on Project Details was not updating when a project custom field was updated via a data field assignment in a process. The LastModifiedDate is now being updated as well as the Audit Log record.
283910	Previously, the system was not showing the Commitment Retainage Percent mapping field. Now, the system works properly.
297704	When a process had multiple dynamic grids on a page with cost items and a shared grids configuration, an error could occasionally happen blocking the process. The underlying conflicts of having multiple dynamic grids and cost items have now been resolved.
296162	When using the workflow designer and saving a workflow, the designer would adjust the view extents around the workflow, though the left alignment could cause some text to not be visible. The adjustment of the extents has been modified to have more room around the diagram to lessen the possibility of hiding arrow text on the left side of a diagram.
294852	Fixed sending notifications to past process actors who are no longer on an account.

- 292522 Previously, the system was throwing an error when trying to add items from a dynamic commitment line item process if the commitment is connected to a master commitment. This issue was due to it missing the call to the service that handles master commitment. Now, the system works properly.
- 217163 Budget Changes were incorrectly being approved when it would reduce the budget less than Actuals Received. Now the validation enforces that budgets cannot be less than Actuals Received, which is the sum of Received Commitment Invoices and Received General Invoices.

## Reports

Case #	Resolution Notes
299972	When accessing the standard cost report and clicking through the hyperlink on "Actual Approved," the user would be misdirected to the wrong page. The link has been corrected to the "Actual Cost" tab view.
297507	When a user exported a report to Excel with negative values, the numbers were recorded as text values instead of numeric. This issue has been resolved.

## Search


Case #	Resolution Notes
296874	When performing a document search, results appeared to be incorrect because of the treatment of a whole word. For example, the search was treating 'Elevators.pdf' as a whole word and 'Elevators' as part of the word. An update has been made for the search functionality to work with part of the word.
298102	When using global search, an error was occurring when users would attempt to download search results containing 'null' field values. This has been resolved.

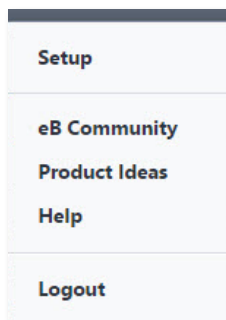
## Submittals

Case #	Resolution Notes
296818	External users who were cc'd on a submittal may have had incorrect editing capabilities on the Documents and Comments tabs (including Attach Revision and Redline links). These tabs have been fixed to reflect the same permissions as the Attachments tab.

## 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. The number of votes is one of the factors considered 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](mailto:support@e-builder.net).