e-Builder Enterprise Q4 Release Notes

December 26, 2013

Table of Contents

December 19, 2013   Q4 Release Notes

New Feature Enhancements

Equipment Management

With a large percentage of project costs allocated to furnishings and equipment - for example up to 40% in medical facilities - it is important to be able to manage these expenses in detail. Equipment Manager allows owners to keep track of the costs associated with items that have been purchased by the owner and installed by either the owner or a contracting company. In this way, owners are aware of exactly what has been purchased, installed and which items are still in inventory, so you know exactly how much money has actually been spent on the project.

Optionally, you can incorporate equipment costs into the overall budget and expense process by tying equipment purchases to your commitments. This will give you an accurate representation of project costs and make the purchasing process more cohesive and better organized. Equipment Manager works perfectly as a stand-alone tool, but also integrates seamlessly with Attainia, a well-known equipment management system used by many healthcare facilities. So if you utilize Attainia for equipment planning, your equipment list can be automatically populated in e-Builder with no duplication of effort or data entry errors.

Usability Enhancements

All Modules:

Infrastructure Enhancements

Several upgrades to our infrastructure will be made this quarter to make certain that e-Builder continues to perform well as our client base continues to grow. We are adding a new ultra high performance node to our SQL server cluster. We have upgraded to gigabit internet connectivity at our primary datacenter residing on the AT&T backbone. This increases our bandwidth and allows the system to continue running at optimum speed and maintains our support of concurrent users. We are expanding our document storage capacity by bringing hundreds of terabytes of encrypted, fault tolerant storage space, which supports enhanced redundancy and at rest data encryption. These enhancements simply expand the scalability that we already provide. Automatic upgrades with no additional costs or service interruptions are just a few of the many benefits of using a SaaS product.

Notifications Improvements

e-Builder notifications have been revamped with a sleeker look and logical format for better readability and appeal. The details of each notification have been evaluated to ensure the most useful data is listed upfront.

Before:

After:

Admin Tools:

Access Delegation

To better assist with troubleshooting and cross-checking permission settings, system administrators and e-Builder technical support now have the ability to request permission to log into the system as an e-Builder user. When a new user is created, the administrator can log in as that user in order to ensure they have the necessary

permissions to complete their tasks. Once the user logs in however, the system administrator will have to request permission to log in as that user. Furthermore, while out of the office, e-Builder users can grant colleagues access to their profiles so processes are not halted while they are away.

Users have the option to accept or decline this request. A link for outstanding requests is available from the My Settings area. If access is granted, users have the ability to set an expiration date and time. It is important to note that actions completed by the administrator logged in as the user will show in the audit trail as the user completing these actions, not the administrator. At any time, before access expires, users are able to switch between profiles by clicking the drop-down arrow next to their username. Should account administrators wish to disable or enable this feature, they're able to do so by going to Setup > Settings > Account Settings > clearing or selecting the Allow access delegation check box.

Bidding:

Edit/Delete Bid Questions

Bid managers now have the ability to delete bid questions. If a question becomes outdated or exposes confidential information, bid managers can delete these questions to clean up the Questions/Responses tab. Questions that are accidently deleted can always be restored by clicking Restore. In addition, the Questions/Responses tab has been updated for aesthetics and functionality.

Next and Previous Controls Added to Bid Scope Items

Next and Previous arrows have been added to the Bid Scope tab so that bid managers can easily navigate through bid scope items. These controls also appear on the Edit Bid Item window so that you can access each of the items in Edit mode. Previously, each record had to be accessed individually through a secondary window. The Next and Previous arrows allow you to navigate through each bid scope record without having to vertically scroll through the page.

Attach Documents from e-Builder when Sending Message to Bidders

Bid managers were not able to attach documents stored in e-Builder Enterprise when sending messages to bidders. This was inconsistent with how documents are attached throughout the system. It also prolonged this task as bid managers had to first download the document before they could attach and send the message. The option to choose files from e-Builder has been added so bid managers can complete this task in a timely and efficient manner.

Add Attachments to Bidder Responses

Bid managers can now add attachments to their responses to bidders in order to provide supplemental information when needed. Likewise, bidders are also able to attach documents to give bid managers more detail when asking their questions.

Add Additional Information to Bid Scope More Easily

The Additional Information tab has been revamped to make data entry easier. Bid managers can now pull in information from another package on any project to avoid having to reenter the same information with every

bid package. Additionally, records can now be added without having to navigate away from this page, which reduces the number of clicks necessary to enter records of addition information.

For instructions, see Add Additional Information in the e-Builder Online Help.

Bid Scope Reporting
A new report type has been added to allow reporting on the bid tabulation across all projects so that an analysis can be drawn on this data.

Bidding Audit Trail
A History tab has been added to the Bid Package Details page to facilitate the auditing of Bid processes. Every facet of the bid process is now transparent to the auditor as they are able to see the exact changes of a modified bid package; when the package was created and closed; and a list of potential and invited bidders and their statues; as well as a history of when the bid tabulation was opened.

Bid Package Details

| Bidding Details | Bid Scope | Potential Bidders | Invited Bidders | Bid Documents | Questions/Responses | Bid Tabulation | Permissions | Bid History |

|◄◄ ◄ 1 ► ►| Show 10 ▼ | | | | 3 items in 1 pages |

User	Date & Time	Task	Action	Description
Sylverne, Benouchka	12/4/2013 3:07:49 PM	Add/Edit Bid Scope Addendum	Created	02
Sylverne, Benouchka	12/4/2013 3:01:34 PM	Invited Bidders	Awarded	Eugine Fitzgerald
Sylverne, Benouchka	12/4/2013 2:59:30 PM	Invited Bidders	Submit Bid Status Change	Eugine Fitzgerald

|◄◄ ◄ 1 ► ►| Show 10 ▼ | | | | 3 items in 1 pages |

Logout Option in Bidder Portal
A Logout button has been added to the bidder portal to better secure bidder information when leaving the site.

Bid Package Template/Add from Projects
Creating bid scopes just got easier! Bid managers now have the ability to create bid scope templates, eliminating the need to manually create a bid scope. The bid scope template can be used for any bid package, across all projects. Now, similar bids can be set up using the template from a different project. Optionally, existing items can be appended to the template in order to update the details of the original line items in tandem.

Restrict Saving of Same Document Folder
When saving items to the response folder, its' subfolders were accidentally being selected as well. Bidders with access to the subfolders then had the ability to see the bid responses of other bidders as they came in. Now, if the subfolder of the bid document folder is selected, a warning message will inform the user of this.

Notification on Issued Addenda
After amending the bid package, a notification automatically went out to bidders who had responded to the invitation to bid. Now, the automatic notification goes out to all bidders who were invited, whether they

responded to the invitation or not. This enhancement insures that all bidders are abreast of the current bid scope, even those whose responses are pending. The details of sent messages can be verified by reviewing the history log of this action.

Printing from the Bid Scope Page and Bidder Portal

The option to Export to Excel has been added to the Bidder Portal and to the Bid Scope page within e-Builder Enterprise™. When the bid scope could only be viewed on screen, the ways in which bidders could use this information was limited. Bidders can now maintain an Excel version of the bid scope, which allows them to compute their figures and then resubmit them as part of the bid. For bid managers, they now have the ability to export a list of the bid scope estimations in order to share data with pertinent parties that may not have access to e-Builder Enterprise or the Bidding module.

Restrict Electronic Bid Submissions

Hard copy signatures are required on bid packages submitted by public bid clients. These clients typically bid on their projects through websites, newspapers, and other public means. Previously, although these bidders were not able to submit electronic bids, they still received the option for an electronic submission, which was misleading. To better accommodate users who are restricted from bidding electronically, an account setting has been added to allow system administrators to restrict electronic bid submissions. This setting can be adjusted at the project level for each bid package. For more information or instructions, see Bidding Options – Enable Electronic Bid Submissions in the e-Builder Online Help.

Bid Package Permissions

Administrators now have the ability to separate the bidding permissions so that consultants/general contractors can manage the creation of bids and answer questions without seeing the responses. This will allow consultants to manage bids for their subs, but not see the bids that they were invited to. Newly added permissions also give creators of a bid package the ability to modify packages so they can make the necessary updates without requiring the admin to first update their permissions. The following new permissions have been added:

- Create Bid Package
- View/Open Bid Tabulation
- Modify Bidding – Users who already have this permission will automatically inherit the new rights of this setting.

In addition to these permission changes, a Permissions tab has been added to the Bid Package Details page that allows bid managers to validate and modify permissions for each bid package directly from this page. Also, if a user does not have permission to access a bid package, those packages will be hidden from sight when accessing the Project Bidding page. Permission restrictions will also hide the Bid Tabulation tab.

Bid Package Time Zone Defaulted to Bid Creator's Time Zone

When creating a new big package, unless you were in Eastern Standard Time, the time zone had to be set each time a new package was created. Bid Managers can now set a default time zone for bid packages, which will give you one less field to complete. The default time zone will apply to all time-stamped items e-Builder. If a default time zone is not saved in your profiles, new bid packages will automatically default to the time zone of the person who's creating the package. To set a default time zone for bid packages, go to Setup > My Settings > Personal Information > My Profile > Click Update – the Time Zone field is located in the 'Personal Information' section.

Associate Awarded Bids to Cost Commitments

After a bid has been awarded, contractors naturally fall into a cost process of some sort in order to set up their schedule of values and begin contributing to the project's success. Getting contractors into the cost process was previously a very manual and time-consuming endeavor for bid managers to complete. Several enhancements have been made to help transition winning bidders into cost associated processes with little manual effort.

For starters, a budget line item association has been added to bid scope items that enable you to select an account code in order to create the contract after the bid has been awarded. This eliminates the manual effort previously required to create a commitment item. In the event that the bid manager did not associate account codes when setting up the bid scope, they'll have an opportunity to do so when creating the commitment, which greatly reduces the number of steps that would be necessary to create a new commitment from scratch.

To be consistent with the way the commitment process occurs in your organization, system administrators are able to determine whether the bid contract creation should be completed in a commitment process or via the Cost module. Optionally, this setting can be adjusted at the bid package level. For greater efficiency, when creating the contract, all known information will be auto-populated, such as company details, and line item information. The contract will open in edit mode in either in the Cost module or at the start step of the

commitment process to allow bid managers to make necessary changes before submitting the contract. This feature is applicable to new bid packages only, not existing ones.

Bidder Portal – Edit Bid after Submission

Bidders are now able to revise and resubmit their bids upon the approval of the bid manager. If bid submissions are accepted after the due date, bidders will be able to request resubmitting their bids up until the cutoff date and time. Bid mangers will receive the request via email and on the Pending Requests page. They have the ability to accept or reject this request.

Bidder Portal – Registration for First Time Bidders

The registration link was not always apparent for first time bidders to see. When accessing the Bidder Portal. The registration option has been added beneath the Bidder login section to make it easier for new bidders to see.

Cost

Cost Performance Upgrades

As a continuation of the updates we made to the Cost module in June, all of the Cost pages have been optimized so you are able to update a large number of items without experiencing a performance lag. To make this page even more efficient, the interface has been modified to allow you to create and update items more quickly.

Funding Source Totals

Changes have been made to the Funding Source Details page that allows you to interpret totals and deposits a lot easier. The total funds available in a funding source was not easily apparent, therefore, a Total row has been added to the Transaction Register tab so you're able to see the total amount available without ambiguity. A new column, titled Total Funds, has also been added to this page that provides the total of all deposits made to the funding source. In addition, the Balance column has been renamed to Remaining Funds, to be more descriptive. Lastly, a Total Funds field has been added to all Funding Details tables that capture the total amount of funds remaining in each funding source. Each of these fields can be pulled into a report so details can be sent to executives. Total Funds can also be added to a mail merge and to cost processes.

Export to Excel from Forecast

Forecast users now have the ability to export data to an Excel spreadsheet. An Export to Excel icon has been added to the Forecast View, Edit Forecast and Snapshot pages. The export is available for both Adjustment and Details modes. This gives users the option to print forecast details to take to meetings or route to team members electronically.

Payment Total Column Added to Pay App

Previously, in the payment application process, manual calculation was necessary to determine the payout amount for an invoice that included the retainge release. A new column has been added to the application for payment table called, Current Payment Due, which displays the true amount to pay if a retainage release is being completed at the same time that current work being invoiced. In addition, the column named Current Payment Due this Period has been renamed, Current Work Invoiced this Period to better describe the figures represented in this column.

Documents

Integrated Anti-Spam

Both e-Builder licensed and non-e-Builder users are able to email content into e-Builder Enterprise™ through the document library email-in capability, calendar responses, and via offline workflow. Especially in the context of emailing in to the document library, these document folders become vulnerable to spam. When the folder URLs are distributed to internal and external participants, these email addresses can find their way into the hands of spammers if, for example, a user adds the address to their outlook address book and their machine is compromised by malware that reads email addresses and sends to spam outlets. The result is that spam content is mailed into the e-Builder document folders.

To address this, we have incorporated anti-spam technology into our inbound mail processor. Inbound messages are now analyzed and determined whether or not they are spam at a customer configurable confidence level. Non-spam is processed normally. Potential spam is quarantined. An interface is also available to help account administrators manage the spam quarantine. Items can be confirmed as spam and deleted or flagged as valid so that they're delivered normally.

If the need arises, account administrators can disable the anti-spam functionality for the entire account. However, this setting is enabled on all accounts by default. Should an account administrator need to delegate

December 26, 2013   Q4 Release Notes

this responsibility, they're able to give individual users permission to manage the spam quarantine. Users granted this permission will only see quarantined messages destined for projects they are a member of.

Users with the appropriate permissions are able to review a list of all inbound emails that have been identified as spam in order to ensure that no valid emails were rejected. These users have the ability to confirm as spam or release for normal processing. All actions taken on quarantined items are recorded in the audit log. Furthermore, those with the appropriate permissions will be notified when there are items in the quarantine so that items don't sit there too long.

Manage Public Access Permission

Administrators are responsible for many things in e-Builder; one of which is granting public access to folders. However, some administrators will find it less cumbersome to allow users in certain roles to manage this setting. Administrators now have the option to give certain roles the ability to manage public access to folders, which gives these roles more control over the folder without giving them full control of folder permissions. Public folder access can be controlled on the account level and for individual folders as well. Account level control gives administrators an easy way to modify this setting should members of the account role change. Consequently, two separate permission settings have been created to support this feature. The 'Change' permission no longer includes public access rights; a new permission has been added for this, called 'Manage Public Access'.

Plan Room - Default Setting for New Projects

The e-Builder Plan Room gives all project participants, including architects, engineers, bidders and contractors quick and easy access to the files they need by simply knowing the file type (e.g. drawings, specifications, job documents, ASIs). Previously, the Plan Room had to be enabled by the administrator for each project. In an effort to streamline this process, a setting has been added to the Administration Tools that will automatically enable the Plan Room on all new projects. This feature will reduce the amount of time and work required to get new projects up and running with the Plan Room, as administrators will not be required to enable this feature every time a new project is added. To configure this setting go to Setup > Documents > Plan Room Settings > Plan Room Access Default. For more information, see Plan Room Settings Page Overview – Plan Room Access Default in the e-Builder Online Help.

Processes

Workflows in Your Court – Comment Requested vs. Action Required

An item shows up as a workflow in your court when you're required to take action on a process step and also when you've been requested to make a comment. Previously, there was no distinction between the two. The workflow in your court table has been updated to make a clear distinction between when you're required to take action versus comment on a process step. A Requested Comment column has been added that will include a checkmark when the workflow item is a comment request. Once comments have been made or an action has been taken, the item will be removed from the workflow items in your court.

Including Process Custom Fields in Data Field Assignments

Although system administrators were able to report on various process types, there was no way to analyze data for similar process types across multiple projects. To address these concerns, we've made it possible to track process types throughout an entire account using a unique numerical identifier that can be derived from a data field assignment. Previously, process custom fields could not be pulled into a data field assignment, but now they can be. This makes it possible to have a number sequence across all projects for every process instance created. Administrators are able to set a counter that will count up in increments of one for each instance of a process step that is approved. This will allow administrators to run reports on the frequency of certain processes.

For example,

To create a counter of all 'Notice of Non-Compliance' processes, create two data field assignments as described below. The first data field assignment will allow you to track the process counter for the specific process type/project and the second will create an account-wide counter.

Assignment 1 of 2:

- Create a process data field of type integer and default the value to zero; e.g. "Notice of Non-Compliance Counter." Make this field available only to select users.
- Create a process custom field of type integer; e.g. "Notice of Non-Compliance Counter." Make this field available only to select users.
- Create a data field assignment on the process step that should fire off the counter.
- In the **Assign to Filed**, select the process custom field.
- In the **Assignment Expression** field, select the process data field and click **Insert**.
- Select the "+" Operator
- Enter "1"

Assignment 2 of 2:

- Go to the Add Assignment page of the same step action.
- In the **Assign to Filed**, select the process custom field.
- Select the "+" Operator
- Enter "1"

December 26, 2013

Process Spawn Choose Initiator as "Automatically Spawned"

Currently, administrators can define the process initiator of a spawned step. Options include the initiator of the previous step or the initiator of the parent process. In some cases, neither option applies. Therefore, an additional option has been added. Administrators can also choose 'Automatically Spawned' to indicate there was no responsible party, but that the process was spawned automatically.

Change Process Prefix after Process Initiation

There are times when the process prefix needs to be updated to better reflect the process name. Previously, the name of the process could be updated after the process was already in use, but the prefix could not be changed. Administrators now have the option to change the process prefix after the process is in use, as long as the prefix is unique for the account.

Reports:

Reporting on Current Actors and Company Name

A process can be held up for many different reasons; previously, when the company was the source of the bottleneck, project managers could not easily make this determination. Also, there wasn't a way to gather statistics to see how often this occurred. To resolve this issue, a new report type has been added called 'Responsible Actors.' This report allows you to generate data for responsible actors on processes and lists the company name and actor name in two separate columns.

Reporting on Baseline Task Duration for Schedules

Users of the Schedule module can now report on the baseline duration. Without this report type available previously, Administrators could only report on actual durations and were not able to compare these figures with the baseline.

Scheduled Reports and Run Now Feature

When administrators or users with report subscriptions needed to validate the content of their reports, the task was unnecessarily challenging because they had to wait at least 15 minutes to run a report after a previous report had been initiated – this is no longer the case. A 'Run Now' link has been added that allows you to generate a preview of the report at any time. The preview gives you an opportunity to determine ahead of time, whether or not you'd like to generate the report. To access report subscriptions, go to Setup > Automation > Subscription > Reports.

Performance Upgrades in the Reports Module

Several performance upgrades have been made to the Reports module to make reporting easier in e-Builder. Large reports can now be generated with less downtime.

Matrix Report - Column Grouping by Week

The capability of Matrix reports have been enhanced to allow users to group columns by a date field using the week. This allows you to see the breakdown of your data at a more granular level so you can get more from this report type than before.

Reporting History and Permissions

System administrators are tasked with ensuring their users get the most out of e-Builder and that the system is used in the most efficient ways possible. Part of keeping e-Builder organized is making sure various areas of the product remain clutter free. Previously, as users created reports, there was no way for the system administrator to know for sure which reports were being used and which were simply taking up space.

Administrators now have access to a History column on the Reports page that allows them to view the usage history for each report. Admins are able to see the names of users that ran each report and the frequency in which the report is used. This gives them a point of contact should they have questions about removing or changing the report. Administrators can also see a list of subscriptions associated with each report in order to gauge how useful the report actually is. Furthermore, the permission settings for each report is now readily available from this page so that administrators no longer have to navigate away from the Reports module to manage and update permissions.

Alphabetical Listing of Report Permissions

When reviewing report permissions by user roles the list of roles now display in alphabetical order to allow Administrators to scour this list more easily. This list will also display in alphabetical order when saving new permission settings.

Submittals

Multiple Submittal Reviewers

Changes have been made to give submittal coordinators more flexibility in the ways they're able to communicate with both their e-Builder licensed and non-licensed sub-contractors. Features have also been added to give submittal coordinators more visibility into the review process to help them manage these exchanges.

To be more accurate, the 'Forward' button has been renamed 'Forward for Review'. In addition, a new 'Forward for Review' page has been added that gives submittal coordinators a place to manage the review process. From here coordinators can send items for review, copy appropriate parties, send and request comments, and also mark reviewed items completed as they come in. By design, coordinators are not able to forward items to anyone twice. When sending comments or attachments, the coordinator is also able to choose which of the general contractors are able to see these items. Should they forget to make a selection, they'll be prompted to do so before they're able to send the comment or attachment.

Reviewers have also been given more flexibility. All reviewers that have a valid e-Builder license can forward submittal items for review to both internal and external parties. Having this exchange initiated in e-Builder helps to keep the process within the system and facilitates the collaboration between the submittal coordinator and

licensed reviewers. Also for precision, the 'Reply' button has been renamed, 'Review Completed.' As the reviews are finalized, reviewers are able to mark each of their items complete so that the requester is always abreast of the current status of their requested review.

e-Builder Mobile™ Usability Enhancements

Workflow in your Court on Specific Form/Process Types
The Home tab of e-Builder Mobile lists all workflows in your court for all form and process types. You were always able to filter for open and/or closed items of a specific project, however, the option to filter by form or processes in your court was not available once you got into a specific project. Administrators, who have access to all process and form types needed to make this distinction in order to better compartmentalize items they need to address. An additional filter option, 'Workflow in Your Court' has been added that allows you to specify the type of form or process.

Redline Eraser Added in e-Builder Mobile™
Redlining allows you to mark up documents in a way that traditional word processing tools do not. While team members could easily add free-hand visual effects to their documents, it was not possible to erase these markups. An eraser tool has been added to the redline feature so project participants can modify their markups just as easily.

A-Z Shortcut list for Contacts
When requesting a comment or selecting a user to send a form to, the list of contacts and users can potentially be very long. Previously, you had to scroll through the entire list of contacts to find the appropriate ones. To help save time and effort, an A-Z shortcut list has been added alongside the list of contact. Tapping any of the letters will direct you to the contacts whose name begins with the selected alphabet.

Link to Maps in the Mobile App
Project Details can include the address of the project site. From the mobile application, this address could not be copied or selected. Address fields are now clickable in e-Builder Mobile™ and will open the mobile device's map so users can easily navigate to project sites.