

e-Builder 6.7 Upgrade

The following information summarizes the benefits available in this latest release, grouped by module:

Dashboards

Dashboard View print enables you to print a hard copy of what you see on screen for external use or distribution, for instance to include with your organization's reports.

Forms

A **contact lookup button** is now available within the forms when requesting an external comment, that links to the contact directory to quickly search and find the email or fax number of a contact, speeding the process of filling out a form.

Documents

The description entered in a file's Description field is now included in the document subscription notifications, which occur anytime a file is uploaded or changed in e-Builder. This makes it easy for someone that subscribes to a folder to get at-a-glance information into the nature of the file that has been added/uploaded.

Contacts

1. Within the contacts module, to make finding a contact or company easier we added a lookup contact/company button to the main views to quickly find who you're looking for.
2. We now provide a way to update all contacts from the same company with one click of the mouse, making it easier for project coordinators or assistants to maintain and update the current contact directory.

Bid

1. There is now a Quick Search text box available to find construction codes faster, making it easier when you're defining the codes associated with a project or contact.
2. Invited bidders will now receive a notification alerting them that their quote has been successfully received to prevent the cases where bidders are uploading quotes multiple times.

3. All bid messages sent will now automatically include your company logo so that bidders know who the message is coming from, and avoid cases where they may ignore an email because they don't know its origin.
4. Preconstruction managers or coordinators can save time with the new capability that allows them to easily resend a message within the message history without having to recreate the message from scratch. This is especially useful in cases where bidders claim they never received the email or fax.

Cost

1. Advanced funding management toolset lets you define your funding rules and requirements at the budget, commitment, and actuals level (e.g., track your commitments against your funding, monitor your funding balances as you incur actual cost), allowing you to provide more detailed reports about funding allocation to stakeholders.
2. We've made it easier to understand what makes up the total of all budget changes for a line item. You can now see every budget change and the value associated with that line item with one click of the mouse.
3. There's a new **Unfinished Drafts** link available in the Jump To Menu that lists all cost items that are in draft status across every project, making it easier for people who update this information to see all items that need to be addressed/updated.
4. **Improved navigation** - Previous and Next arrows are now available in the details of a cost item to quickly navigate between commitments and actuals to scroll through and identify the item in question.
5. To prevent a user from not updating the date when entering a cost item, the user now has to select a date each time. The current date is still available to select quickly but it has to be manually clicked on forcing the user to make a conscious decision on the date selection.
6. To eliminate conflicts with your organizational approval procedures, there is now a setting that lets you define whether to require approvals for zero-sum changes.
7. New cost import tools improve the migration of cost information and integration with external systems. To find out more contact your Account Manager or Professional Services team.

Reports

1. **New extended export options** - You now have more options available when distributing reports. The new options allow you to export reports to FTP, via Email, or to a Folder within e-Builder. In addition, you can also select different output Types, such as HTML, Excel, and CSV.

Admin

1. Improved viewing of Folder Permissions Report - The header row is now locked giving you a full view of all report output no matter where you are on the screen, making it easier to understand the permission assignments as you scroll down the screen.
2. To help streamline the process of reconciling a budget in e-Builder to an external accounting system, administrators can now create line item custom fields that can cross reference an e-Builder code to the accounting system code.