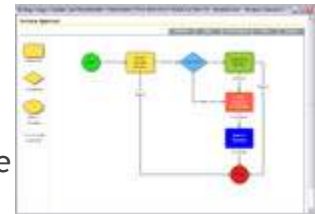


## Structured Workflow

The structured workflow enhancement is one of the most sophisticated and powerful enhancements ever incorporated into e-Builder. It is an add-on that complements the existing workflow engine. The biggest benefit of using it is that you can manage and tightly control very complex processes without relying so much on human judgment. Your organization can ensure that a complicated process is consistently followed while at the same time simplifying the steps for individual users. Capabilities include:

- Integration with other e-Builder modules. For example, cost data can be updated during a change management process automatically, along with the cost sheet or your anticipated cost report, without requiring that you access the Cost module to update this information, and thus eliminating redundant data entry.
- Key documents required in a process can be mapped to specific folders, further improving project execution.
- You can configure, update, manage and assign workflows to your projects using an easy-to-use drag and drop designer interface.
- Automated steps simplify the project participants' process when responding.
- A business process is structured - this means each instance is managed according to the same business rule you define, every time. This results in stability in the business, predictability of resources, and faster 'on boarding' of your employees.
- Tighter compliance with regulatory organizations. The system provides an automatic audit trail for compliance reporting. Automatic routing of information through a process ensures that no steps are forgotten or missed, resulting in improved compliance.



## Cost

- It's now easier to add new commitment items when entering a commitment change in cases where new scope may need to be included in existing commitments.
- In the forecasting toolset, when building your forecasts there is now an easy way to drill down in more detail to understand what makes up the totals of your budget or commitments. With one click of the mouse, you can now see every detail value associated with that line item to help you build your forecast.
- To make it easier to read the numbers you are entering in the forecast before you add the entry, when you tab or click elsewhere, we now insert commas and decimal values.
- You can now void invoices marked as 'paid' for situations in which accounts payable short bills or cancels an invoice (for example if they require that a new invoice be submitted).

As a result you no longer have to offset the paid invoice by creating another invoice. With the right permissions, you can press a 'void' button.

- We heard that financial teams may forecast cash flow off of paid invoices, not approved. When updating cash flow you can now choose via a drop down to calculate your actuals-to-date for each budget line item off of the approved invoices or paid invoices.
- When adding commitment invoices, we will now provide you with the amount currently invoiced to date, giving you a full understanding of what has been invoiced, and what remains to be invoiced.
- When viewing commitment invoices you now have the option of showing all associated commitment line items and not just those paid by that invoice. You can choose to show only totals for this invoice or totals for all line items by clicking a checkbox.
- Similar to giving you the option to turn off invoice auto-numbering, you can turn off commitment auto-numbering as an administrator. This ensures that the right number is keyed in by the team.
- More cost controls in place. If you have budget line items such as contingency, which cannot be committed or invoiced against you now flag those budget items as 'no charge allowed,' preventing your users from making the mistake, further ensuring your cost project data is accurate.
- New Excel import capability lets you create budget templates in Excel and import into e-Builder.

## Reports

1. A NEW running total row is available in matrix reports. For example, your budget change report can now include not only a grand total row that shows the amount for each change, but also a running total row that shows the total budget after the adjustment.
2. To further facilitate your structured processes in e-Builder, on the project processes page you can now access a reports tab that will show you all the key log reports related to the filtered process, making it easier to access your key performance or log reports.
3. To further refine report output, you can now run the report within date ranges, reducing the administrative work required to generate key reports that filter on dates. And at the time of running the report you can modify the date range and re-run the report, further reducing the need to create specific date-driven reports.
4. You can now define your fiscal year. In the reports, if you want return results where it is within the current fiscal quarter (for example), the dates will be set based on your fiscal year definition, producing more accurate reporting.
5. Multiple checkbox data or custom fields can now be reported individually instead of each combination separately, producing more meaningful reports and dashboards. This means

that if, for example, you track which trades are affected by a particular plan change and select vendor A and B for one instance and vendor B and C for another, the report will show distinctly that A is selected one time, B two times, and C one time.

6. For organizations that define users according to specific business units, divisions, areas, or other geographical custom fields, reports can be configured to return the results based on a user's defined attribute, reducing the administrative overhead required to define key reports.

## Dashboards

The pie chart has been overhauled. The x-axis field names can be defined to a maximum character length, 0 values no longer show, and if you mouse over a pie graphic, the label name description is displayed, making the chart easier to read.

## Bid

You can now invite, award, revoke, and delete a bidder to partial codes. If, for example, you invite a bidder that typically does MEP work but due to resource constraints can only participate in mechanical work, you can choose to invite them to bid on only that code.

2. We improved bidder login and access to help simplify the bidder experience:
  - a. Link at the e-Builder login screen to direct them to the bidder login page.
  - b. If they log in at the e-Builder login screen, instead of the bidder login page and they are not currently active as a user in any construction projects, we will automatically route them to the bid projects.
  - c. On new bidder registration, we now include a message front and center to resend the password to prevent the bidder from re-registering.
  - d. If a bidder forwards the invitation to their associate and their associate requests access the bidder receives an email notice of the event, keeping them in the loop.
  - e. E-mail invitations now include an access code (separate from the user login password), so that if the bidder prints the invitation to bid and hands it to a colleague that person can log in using this code.
  - f. The invitation code is also provided in the invited bidders tab, so that if bidders cannot log in you can provide it so they can access quickly.
  - g. The bidder's username is included in the contact details in the contacts module, so you can inform them in the event that the bidder forgets his/her username.

## **e-Builder 7.1 Upgrade**

### **Documents**

A NEW integrated viewer lets you view any file e-mailed directly in your project folders without having to download it.

### **Forms**

1. A NEW forms import tool that allows you to integrate and migrate critical project records from other systems or import a submittal registry to stage and fire off when approval is required.
2. To prevent your e-mail notifications from going unnoticed when recipients don't recognize the sender, administrators can now set the 'From' name for all system-generated notifications with a name that will get the recipients attention, e.g., Project Phoenix.

### **Calendar**

1. When you edit the occurrence of a calendar series, you can now edit all the fields, such as what, when, where, description, and required/optional attendees, eliminating the need to delete and re-create.
2. Do you have defined locations where meetings occur? If so, in the 'Where' field you can select from a defined list of locations configured by the administrator, reducing the margin of error.

### **Miscellaneous**

1. For all mail-merged documents you can now choose to configure the output to be in PDF format. For content-sensitive documentation such as contracts or changes, this keeps the document from being edited or changed after the merge is executed.