

## e-Builder 7.3 Upgrade

### Benefit Summary

#### BIM Support

- **Support for BIM** review allows you to work with BIM files without third-party software, enabling new collaboration opportunities using an integrated NavisWorks viewer. You can upload a BIM file into e-Builder published to the NWD file format , which includes all loaded models, the scene's environment, the current view, and favorite viewpoints, so that users can view the file and its animation without a Navisworks product installed on their workstations.
- **Improve collaboration during design review** with project participants that do not have access to e-Builder - public folders now have the redline link available for non-e-Builder users to access those markups, reducing the administrative overhead required to support this process. As part of this enhanced process you no longer have to print to JPEG or PDF the redline markup and re-upload to a public folder to share these marked up files.

#### Cost Management

- **Improved cost audit trail** with an enhanced Forecasting process, using capabilities that provide new ways to attach supporting documentation to your forecasts, and more options when saving forecast snapshots
- **Greater visibility into budget line items** at the point of data entry during Contract Approvals - when entering commitment line items you can now see the current budget line item amount without having to look in a different screen, to help you from inadvertently exceeding the current budget amounts
- **More control** during the Payment Application Request Process to ensure that vendors entering pay apps only see those contracts they are associated with
- **Unitized Cost Management** - within the e-Builder cost module, commitment items, change items, and invoice items were previously recorded as lump sum values. However, on occasion there is a need to track these items in a unitized fashion, allowing quantity and unit cost to be entered to calculate the total amount. This is important in "horizontal" construction such as highway and infrastructure projects, where it is also typical to track progress (in terms of quantity placed) as part of an inspector's daily report. Monthly progress payments are made based on work completed during the period. Commitments, commitment changes, and invoices will be extended to support entering items in quantity / unit of measure / unit cost format in addition to the current lump sum format.

## Cost-driven Structured Workflow

Workflow Enabled Cost Management to enforce organizational best practices as you manage your cost sheet.

We've expanded the e-Builder cost module to support any number of cost processes beyond the built in budget, budget change, commitment, commitment change, actual cost objects, with up to 32 additional configurable columns on your cost sheet. In addition to the built in cost objects, e-Builder workflow processes will be configurable to support a list of line items that tie back to the project budget line items. Additional cost sheet columns can be defined as a formula consisting of any combination of line item containing processes in particular statuses and the build in cost columns.

- e-Builder's cost module facilitates tracking and control of budgets, budget changes, commitments, commitment changes, and actual costs through a collection of specialized document types with minimum setup time and effort. However, in some cases out-of-the-box functionality may not adequately support all of your organization's needs. For instance:
  - General contractors that need to manage cost on their expense side and revenue side separately.
  - Owners that would like to track costs more granularly than they can with e-Builder's built in cost document types (i.e., tracking two different budgets)
  - Program managers that need to track some internal costs in addition to managing the costs associated with their client's project.

## Reporting

Get more information and gain additional insights into your project status with the new Reporting capabilities that include

- New columns available in key cost reports.
- Expanded schedule Gantt chart report by adding a Tracking Gantt output view.
- Ability to change the system generated output file name of all scheduled reports to a name that is more appropriate for your reporting needs.

## Structured Workflow

Develop, carry out, and monitor Structured Workflow (Processes) faster than ever

- Prompt users for their password when actions are taken on processes that require a more formal signature for improved audit trail
- Update multiple fields' properties in form sections speeding up the time it takes to build out your layouts
- More administrative controls such as:
- Re-open a finished workflow and move it back to any step in the process, for instance when a mistake occurs or an issue needs to be re-visited
- Complete control over all data entry points - update any data field's value regardless of whether it appears in the current step's layout.
- NEW process views let you see the correct data when you need to see it as it relates to a process.

## Scheduling

- Expanded options to collaboratively manage Scheduling with new support for importing 2007 MPP project files.
- To improve usability and adoption, NEW calendar type views that mimic what people are accustomed in their email calendar applications to are now available. Also, new tabs (week and month) have been added to the schedule task views that show your task assignments in a calendar type fashion to simplify how you see what's required over the course of a week or month.

## Submittals

Save more time and improve visibility during Submittal Management with

- New ways to communicate and request comments to your vendors and sub-consultants who are not e-Builder users
- Easier maintenance of multiple versions of submittal document markups and updates
- A faster way for contractors to update due dates on multiple submittal register items simultaneously.

- Avoid confusion and miscommunication with more lock down controls so that when packages are sent for review to the architect no updates are made during the approval step
- New revisions tab at the submittal package level linking you to the full revision history.

## Bidding

Improve your bid coverage to get more competitive bids with the new Bid Management Enhancements -

- Faster review with the Fax number now included in construction code view so that it's not necessary to switch between views to retrieve the fax number.
- Better way to review and understand what bid participants have reviewed
- We've made it easier for you to filter the bidders you want to communicate with using improved sorting options in the bidder send message screen.
- To speed the invitation lookup process there is now a 'Show Most Recent Company Note' checkbox located in the lookup invitation screen and potential bidder tab to see the most recent note added for a company.

## Forms

Faster indexing and search capabilities for improved access to Forms

- Form archiving so that RFIs, project issues, changes, ASIs, design reviews, and other processes leveraging forms are completed you can now set it up to automatically archived to a project document folder when completed. This eliminates the need to look in the document and forms modules for certain project record information.
- To help meet compliance requirements, administrators can set it up forms so that when they close they automatically print to word or PDF format and are stored in a predefined project document folder.
- Form views - when building out form views there may be cases where you want to show specific data fields relating to a specific form. For example, you might want to show all project issues with the issue description and next steps, for example. In form view setup you can now filter on a specific form type and include specific data fields as columns for display, ensuring that you see the data you need to get your work done.

## Project Directory

Quickly locate and communicate with project Stakeholders with **Project Directory** - in scenarios where you are requesting an external comment on a form, sending documentation out to consultants, or inviting external participants to a calendar event you may want to refer to the project directory.

The project directory is a list of contacts that you associated to your project. In these cases if you set it up in your user profile you can ensure that when looking up contacts in the above scenarios it will default to your project contact directory, speeding up the time it takes to find the right people you want to communicate to.

## Calendar

Leverage Calendar tools for faster navigation across project specific and account-wide calendar events, reducing the time required to create and track calendar items

- To help differentiate between project-specific and account-wide calendar events we now show a graphical icon for project-specific events,
- In scenarios where you might not have responded to the initial meeting event request, you might want to provide an update when the reminder is received. Calendar event reminder notifications now include the ability to accept or decline the meeting.
- Documents and forms can be attached to calendar events. In scenarios where you might want to attach a previous meetings agenda or the proposed meeting topics it might make more sense to attach supporting documentation instead of putting all that detail in the calendar event description.
- Can copy existing calendar events speeding up the time it takes to create a follow up meeting.

## Administrative Tools

Simplify how you manage changes to your processes as an e-Builder Administrator while still maintaining data integrity

- As processes evolve, get refined and are modified over time, and you need to replace data field values on your processes you now have the option of choosing whether or not you wish to replace the data field values on your finished processes, ensuring that your finished project records can be locked down.

- To reduce the time needed to manage role assignment of new users added to projects from the project participants screen, you can now use intuitive buttons to quickly add a user into the right roles