e-Builder 6.3 Upgrade

e-Builder 6.3 is the latest and greatest version of our project management and collaboration platform, which includes the following upgrades. Use the links to the right to quickly navigate to the different upgrade topics on this page.

Administration Tools

We've made e-Builder administration easier to configure and maintain. You can now assign custom fields to form types to help you manage and maintain your list. We also added filtering for schedule and budget templates. For instance, you can use this if you want to return all the form types that are associated to your architectural processes. If configured as such, you will be able to filter and return only those form types (like your Design Review) that match that criteria.
The Manage Membership screen where you as an administrator can add a user to various projects and/or roles has been upgraded! You also can add these users to the administrative group (project manager group) directly from here instead of having to access the project participants screen of each project. You can also send the standard email notifications (‘username/password’ and ‘add/remove from projects’).

For those roles that are flagged as an administrator and have the Manage Users permission we adjusted the permission to allow them (in addition to what exists today) to remove users from the account.

Cost Management

For the project manager or executive, we added configurable views to make it easy to look at cost summary data the way you need to look at it.

For the project assistant, we **made it easier to add multiple commitment invoice entries to the same commitment** as well as the ability to quickly manipulate your funding source allocation on an invoice regardless of the status. Plus, any bit of data that you are looking at can be exported to Excel right from the screen with the click of a button! The result is less time configuring reports.
If you are entering project cost data in e-Builder on a regular basis, e.g., entering commitment invoices in bulk on a predefined basis per week, **we improved the process of entering multiple commitment invoices against the same commitment** by providing you with a ‘Save and Add New’ button in the 'Add Invoice' screen.

Schedule Management

You may be collaborating with others as you are looking at the project schedule variance or tasks that are remaining to complete. Or maybe you are reviewing the status of your critical tasks to complete permitting. As a result **we've made it easier for you to distribute scheduling and task information by giving you the ability to export to Excel right from the screen with a click of a button**. We have eliminated the need to go to Reports to figure out how to generate the same information for distribution.

Reports

Are you responsible for monitoring and increasing e-Builder adoption? Or are you looking at the bottom line and want to make sure you are getting widespread use of e-Builder? If so, we are including the number of logins in the administrative reports so **you will be able to easily report on who has or has not logged in within the last X days**, or how many times have certain users logged in within a defined time period.

Forms

Need to customize your forms or build your corporate branding for print outs, hard signature requirements or mass distribution to external consultants or clients? Look no further! We've incorporated merge capabilities within your configured forms. You will be able to merge all the form data from any of your collaborative processes in concept/planning, design, bidding, construction or operations. Merge your budget approval, payment app request or submittal package (as examples) to your standard document template that you have been using for years before e-Builder.

If you deal with short-term e-Builder users, e.g., outside consultants, vendors, subcontractors and/or engineers, we made it easier for you to designate temporary e-Builder team members without requiring them to be full time users of e-Builder. You will be able to request a comment and have these types of external project participants add comments via email directly to your forms.

Documents

If you still use e-mail as a traditional method of communication with your various vendors, clients, consultants and others **we've added the ability for you to easily email these critical project records directly into a folder in your document library**. You can send any documents attached to your email message directly or route the entire email body with the attachments. In turn, the document library can display the attachments for viewing or the email itself including the from address, subject line and date and time stamp. And, if you need to find it later we made sure our search engine pulls them up for you so **you can spend less time managing your project records**.

Are you attaching the physical scanned invoice to your commitments and general invoices? Or are you attaching other supporting documentation to your tasks, schedule, bidding activities or other cost items? If so we sped up the workflow for you. You are no longer required to upload the document first in the appropriate document folder location. We upgraded the upload process so that you can upload the document directly to the cost, task, schedule or bidding item in one easy step.

Need to copy documentation across projects? If you spent time downloading documentation only to upload again to another project folder, we created a new 'Copy' link in the folder bar in which you can now select another project's document library and copy the document(s) directly there without requiring an additional download/upload step.

When viewing your folder tree of documents you can now configure whether you want to see the total file count of files contained in the folder and its subfolders or just the folder itself. This can be done in your My Setup within the Interface settings.

Want to be able to send your folder shortcuts proactively to various project team members so as to allow them to click the folder name in your email to quickly direct them (upon login) to the contents? If so we added the folder URL link (web address link) to the folder properties of each of your viewable folders.

Bidding

For those clients integrated with your local reprographer we added a new column in your bid coverage to show you if an invited bidder has received at least one set of printed plans/specs. There is now a '# Prints' column which will show a running count for every bidder who has picked up or received a shipped order of plans and/or specs.

Need to know who to send your messages to or who to add as recipients when ordering prints in their behalf? If so we improved the filtering on these screens so you can easily filter those invited bidders that you want to communicate to or order prints for.

Reprographer Toolset

We added automatic page breaks per transmittal returned for your print orders.

We also upgraded the download so that you can just download the transmittals instead of the transmittals and ordered print documents (in the case that you already have the most recent bidding set in your local environment).