

## e-Builder 7.2 Upgrade

### Structured Workflow

- Drag and drop multiple fields to and from sections speeding up the time it takes to build out your layouts
- Automatically assign the subject of your workflow based on business requirements, eliminating the chance of mistakes
- Automatically assign values to your project custom fields/attributes based on actions taken in the workflow
- When an action routes back to a previous step in a workflow you now can configure the action to only notify the actor from that previous step, ensuring only the appropriate person is notified
- NEW data field types
- Radio button checkbox lists are available, giving you a full list of display options
- Company and Company On Project fields are available that is integrated with your contacts module, eliminating redundancy and ensuring data integrity
- Process Lookup data field is now available which allows you to lookup another process to facilitate the linked association of two or more key processes, such as action items to a meeting minute or change order requests to a change order
- In the project processes display page, if you filter for a process you can now select from a list of available step names, making your searching easier.

### Cost Management

- You can enforce the approval of allowance spending more efficiently by flagging commitment items as allowance items and forcing a commitment change before the money can be spent.
- Retainage is now calculated automatically on both commitments and invoices, and at any point you can issue a retainage release while e-Builder keeps track of how much has been retained to date
- When Forecasting you can choose between the existing Detailed Mode, where you enter detail items for each budget line item, and Adjustment Mode, which lets you adjust the unallocated reserve up or down. Both of these methods adjust the estimate at completion up or down affecting your variance, so you now have two options to build out the forecast.
- Adjust the forecasted over/under calculation to be done based on the current budget or projected budget to give you additional options.

- You can configure your budget templates to override a segment value when applying it to a project, eliminating the need to create multiple templates. For example, if you applied a template to your budget for each site location you can set it up so when you are applying a new site to your budget you are prompted to select the value at the time of applying the template.
- Can now delete multiple budget line items simultaneously after applying a budget template.
- For all cost items (such as budgets, commitments, commitment changes, and invoices) that are approved or rejected with a comment, the email notification now includes the comment and a link back to the item.
- When in the detail of a cost item (such as a commitment) you now will be prompted to enter a comment if you reject it, ensuring that all parties involved are notified as to why it was rejected.
- When building out your budgets you can now attach supporting documentation to your line items, ensuring all estimates or other related information is included for additional detail.
- Approved and pending commitment amounts are now included in the budget change display giving you visibility into what was been committed.
- Just as we extended the commitment change item description, the commitment item and budget change item description character lengths have been increased, ensuring your detailed description is captured.

## Reports

Process Log and Summary reports include time stamps for date fields, providing more granularity

## NEW Submittal Management Module

Built from the ground up to facilitate and promote work with the contractor, it is a comprehensive system for exchanging, reviewing, and archiving construction submittals. Benefits include full visibility into the submittal approval process for all parties, reducing submittal turnaround time, decreasing paperwork, and reducing costs for shipping, postage, and handling. Capabilities include:

- Transfer submittal packages to reviewers with a press of a button, eliminating time delays

- Submittal log automatically updated based on updates to each item by A/E and contractor
- Automatic notification to reviewers, no manual routing required
- Transmittal automatically generated when you execute a mail merge within e-Builder
- Advanced search in the register and package displays makes it easy to find the information you need when you need it
- Permissions are built to support the process; add/edit submittals, view submittals, and approve submittals.
- History of all notes added through the approval process ensuring nothing gets lost in the exchange.
- Easy-to-use import wizard to load the submittal register in ahead of time before construction starts.
- Create revisions to packages with a press of a button, which includes those items that were marked revise & resubmit from the A/E.
- Track key dates (baseline and actual) for each submittal item within a package to make sure the process is facilitated efficiently.

## **Project Management**

- Build and maintain a project directory to share with all participants, fully integrated with the contacts module. Import your own directory from Excel to reduce the set up time.
- NEW Import Project tool set to allow you to quickly front load a set of projects.

## **Bid Management**

- When blasting out bid invitations to your bidders you now will see how many times an email invitation has been opened by a bidder in the message history, giving you more visibility to ensure you bid coverage is strong.
- Can now export to Excel the invited and potential bidder information right from the screen instead of having to create a report.
- Those bidders marked Do Not Use (DNU) will not be available to be selected during the invitation process. The checkbox is disabled when mass inviting to ensure you don't accidentally invite those bidders.
- When sending a message (such as a bid reminder notification) you can now filter on bidder status (will bid, will not bid, pending), eliminating the chance that you will inadvertently send message to bidders that are not participating.

- Outstanding Bidder Requests display now includes the username of the user requesting access. The bidding coordinator can see if the user requesting access is really the same user but has created a different username that is associated with the invite. Coordinator can reject and inform bidder to log in with the username associated with the invitation.

## Documents

- Copy to Clipboard links are now included in the folder bar display, eliminating the need to click on the folder properties link to retrieve this information. Available links are the private folder URL, and (if enabled) the public folder URL and email-in address.
- When searching for documents often times you might want to look for a specific folder name. The search mechanism now searches on file names and folder names simultaneously, giving you a more robust search.

## Calendar

- In the calendar email notifications for participants we now include whether it is optional or required, eliminating the need to log into e-Builder to retrieve this information.
- When inviting or removing people to/from a calendar event we now ask the calendar event organizer if they want to send an update to either the added or deleted attendees, eliminating unnecessary notifications to those participants not affected by the updates

## Admin Tools

- When editing a custom field or process data field's value that's in use within a conditional branch and/or data field assignment you will be warned, so you are aware of potential impact of the change.
- NEW permission added called Update Project Details, allows you to grant permission on editing the project detail information, including custom fields. Another option for administrators to delegate their work load to other users.
- Manage Permissions and Permissions by User displays now lock the header row, making it easier for you to look at your list of users and roles and see their configured permissions, especially for those administrators managing lots of users.