e-Builder 7.4 Upgrade

Working with Files and Documents

Newly enhanced support for BIM collaboration, new file synchronization, search capabilities and more

- **Synchronize File Updates From Your Workstation to e-Builder - the WebDav Tool** enables users to work with files and documents in their workstation, and automatically synchronize changes or updates to the corresponding e-Builder document folder.
- Users will not have to upload or download large files to and from the e-Builder document library;
- Users will reduce steps to save files – all a user has to do is save the file in their local network environment and the correct e-Builder folder will be updated automatically;
- This tool provides specific use options to teams that are collaborating with a BIM model
- Users can continue to work with files the way they're used to, without having to log in to e-Builder to update revised files.
- **Enhanced Document Categorization and Search - Broadens** search capabilities with new ways to categorize files/documents with user-defined custom fields.
- Users can associate Custom fields to unique project attributes like: location (state, city), building type (student housing, chiller plant), or any other attribute that could help a user retrieve a file faster by searching on those attributes.
- For example, if you want to pull up as-built drawings to understand the installation of key components or to assist in the design development of a similar renovation or installation you can "tag" as-built drawings with custom fields of: Floor, Vendor Name, Trade, and Building Name. You could then search for 2nd Floor, HVAC, and/or Cosmopolitan Building to quickly locate the corresponding files.
- This provides broader search capabilities to ensure users can find what they are looking for. In particular, we've added phrase search, exact word search, terms to exclude, AND operator, OR operator, and parentheses search methods.
- **Improved "Google-like" Search -** in addition to the metadata ("custom fields") search capabilities mentioned above we offer additional search methods, that mirrors search functionality on familiar web search engines like Google.
- **View latest Autocad and Microstation file versions - Upgraded CAD Viewer -** the e-Builder integrated CAD viewer (Brava) allows you to open, view, and markup complex files (i.e. CAD) without requiring that you have the native software installed on your computer. This upgrade supports viewing and markup of AutoCAD (2010) and Microstation (8.1) files. Primary benefit is better usability, which includes improvements to redaction,

measurement and calibration, markups and annotations, navigation options, and publishing and exporting.

- **View Emails within e-Builder - Integrated Email Viewer -** A NEW integrated viewer lets you view any email message and file sent directly in your project folders without having to download it. If any attachments are included within the message they too are able to be viewed in the new viewer.
- **Collaborate with BIM Files - Integrated Navisworks BIM Viewer – A**llows you to review, markup, and collaborate on BIM files within e-Builder, enabling new collaboration opportunities. Users can view all 3D files published to the NWD file format, including all loaded models, a scene's environment, the current view, and favorite viewpoints (including the animations) without a Navisworks product installed on the workstations.
- For those documents sent via email or fax that failed to be received you now have a resend link available for quick processing.
- Spell check when sending documents out via email and/or fax.
- When viewing MSG files with attachments you now download them or copy them to another folder in e-Builder making it easier to store.
- NEW filter available on Folder Permissions page – checkbox added called 'Hide folder detail if permissions same as parent'. If checked then no longer will you see subfolder permissions that are exactly the same as the parent making it easier for you to navigate to the permissions that are different to validate the configuration.
- If you are still using the single file upload tool (not the multi-file upload tool) and are uploading a file we now show you a progress bar to let you know how much longer the upload requires.

Working with Reports

More Flexible Report Creation

- Do you require more options to format the look and feel of reports output from e-Builder? e-Builder can now output data to other reporting applications (Crystal Reports) for more flexible reporting options.
- Are you taking advantage of e-Builder's linked process mechanism? Tie your change order requests to a change order by creating a process data field of type lookup. Have your users associate change order requests to the change order when filling them out. In return, you now (as an e-Builder administrator) have the ability to create new report types that can show the linked associations in one report.
- NEW process routing history report type available. Should you need to see the history of a process from start to finish and how it got to where it's at currently you can simply

generate a new report to see the full routing history step by step. No longer are you required to click in the routing history for each process instance.

- More options available in the report wizard. You can now resize the column width and color rows or cells (based on low, medium, and high thresholds) returned in the report. By adjusting the column widths you can potentially view your reports on the screen without scrolling left-to-right and provides better structure for printing requirements. The row and cell coloring provides another mechanism to highlight KPIs (key performance indicators).
- Cost reports updated – budget amount column in the budget change items, commitment items, commitment change items, actual cost items, funding and cash flow details reports now include the original budget, current budget, and projected budget amounts ensuring all budget totals are available to report on, supporting all business cases.
- Schedule & Task Gantt Chart report, there is now an option to include or not include the resource name in the report output. Pending on who is receiving the report you may not want to include the resource name as part of the generated output.
- Document Log report now supports displaying the full folder path of each returned document in the report output. A new column called 'Folder Path' has been added and if checked shows the entire folder path from the root Document folder to assist in the management and coordination of files stored in hierarchal document structures.
- Additional filter options when sending reports via email – when sending a report and filtering on 'users only' you now can choose to filter further based on role making it easier to find the users you want to send the report to. In situations where you may have a lot of users in e-Builder it can prove difficult to search between 100+ users without the ability to filter further by job role or function.

Defining Structured Processes

- For data fields of type file (i.e. a field that requires a user to upload a document to it) we now show a progress bar letting the user know how much longer the upload requires.
- If your processes have a linked process data field which supports scenarios where you might want to associate action items to a meeting minute or change order requests to a change order then you can now attach existing filled out processes to the parent process. For example, when creating change orders there is now an attach existing button in the change order request tab within the change order form so that users can attach change order requests to it to fully support the change management process.

Working with Budgets/Costs

New approval streamlining features, budget creation features, and much more

- Cost Controls
- Notify users when approval requested – if this setting is turned on then all users who have the approve permissions on cost items (i.e. budgets, budget changes, commitments, commitment changes, etc.) will get an automatic email notification preventing any possible delays.
- Allow users to create new company/contact when adding or editing invoices or commitments – to prevent users from entering duplicate company names (i.e. 'e-Builder' and 'e-Builder, Inc') while entering new invoices or commitments you now have the option to turn this feature off.
- When marking invoices and commitments to approve status and they violate a cost control (i.e. a commitment invoice exceeds the commitment amount), a button will (if permission granted) quickly direct you to make an appropriate change, as you see fit. No longer are you required to go to another area (which takes extra time) in the cost menu to make the change to ensure the cost control rule will not be violated.
- Managing Approvals: New tab shown in Items Pending Approval called 'Approval Requested By Me' that will list out all cost items that you requested approval on for at-a-glance view of an item's status.
- Creating and Managing Budgets:
- When adding new line items to draft budgets you can now see the budget and the impact as you are adding the line items. No longer do you have to save each line item in a separate screen and then validate what you added in another screen.
- When switching between views of the cost summary and budget details screens the codes will now be collapsed and expanded based on the last time you visited those pages. No longer do you have to expand or collapse the codes every time you re-visit these pages.
- Creating Commitments:
- When adding or editing commitments you can now add new line items directly on the screen within the commitment line item grid to make it easier to enter new items and see immediately what the impact is.
- When entering commitment line items we now show what's remaining to be committed for that budget line item saving you time from switching between this screen and the budget details screen.
- Creating and Managing Commitment Changes: Budget Line Item is now included as a column when viewing and editing commitment changes for those of you that may need to reconcile (or validate)changes to the right account codes.
- Updating Cash Flow: 'Remaining To Be Allocated' column in the update cash flow screen is now locked when scrolling to the right to enter future month cash flow amounts. No

longer are you required to scroll left-and-right to remember the ‘Remaining To Be Allocated’ dollar amount.

- Entering Formulas for Budget Line Items: when entering a formula for a budget line item we now include the line item description to ensure at time of entry that you know exactly which line item is which saving you time from having to navigate back and forth between this screen and the main budget screen.
- Notifications: approval and rejection notifications for commitments, commitment changes, commitment invoices, and general invoices now include the company name associated with the item in the notification.
- Items Pending Approval tabs now shows the company name for those cost items associated to a company, saving you time when reviewing items pending approval or requested approval by you.
- Cost Approval:

Working with Schedules

- Task resource and manager assignments now include the company name the user(s) are associated to making it easier to assign tasks to users.
- The task details page now shows the task as it fits on the schedule. That means it shows any summary tasks that it may be associated to above it within the task name field. There may be cases where tasks may receive the same name due to it being required to be executed more than once on a project. By including how the task fits in the schedule it will prevent any confusion as to which task is which when updating tasks.
- For those of you responsible for managing the assignment of resources (users) to tasks, when updating multiple tasks at once you now have the option to reassign task resources right from the screen saving you time. No longer do you have to reassign work from within the details of each task one by one.

Google Map in Projects View

- We now include a ‘view map’ link in the project details if an address is entered providing all users a Google map of the specified project location.

Managing the Bidding Process

- Public Bidding – define a project as a public bid in e-Builder which grants you the following benefits:
- Can decide what information will be required to be filled out and collected from each potential bidder ensuring all information (company name, email, fax, address, etc.) is properly collected

- Can decide whether or not to allow bids to be submitted after the bid response date. If set to not allow then e-Builder will automatically disallow any bids post bid response date.
- Automatic public bid web address link is created to distribute or post on another web site. Once a potential bidder clicks on the link they will be instructed to fill out the required contact information before accessing the plans and specifications.
- Countdown digital clock is shown for bids where it is set to lock bidders after the bid response date ensuring bidders know how much more time is left.
- Usability Improvements:
- When updating bid status on the bidder view you can now update the bid status of all codes for a bidder with one click of the mouse making it easy to do a mass update.
- All bid fax coversheets now includes the account client name so that if a bidder receives an invitation from two potential clients of which both are using e-Builder, the bidder will know which fax is which.
- Can now re-invite multiple bidders for a specific code all at once from the construction codes view. It is not necessary any longer to switch to the bidder view to re-invite multiple bidders saving you time.

Forms

- Request external comments can be executed at time of filling out the form to prevent an unnecessary post to yourself or another party first.
- Users can print draft forms for review or approval before submitting as a project record.
- When editing fields on forms (i.e. RFI, action item, budget change, etc.) the form can be configured by an e-Builder administrator to prompt the user upon saving to notify other form participants of the update. The prompt saves users time since no longer would they have to separately enter a comment to notify others of the update.

e-Builder Faxing

- For scenarios where project participants are sending in a fax using e-Builder's bar-coded fax sheet (i.e. faxing a document to a folder or responding to a bid), the fax service to process the request has been improved. If the participant does not place the fax return coversheet as the first page or it's read upside down we still process the request with no bounce, significantly improving the fax automation process in e-Builder.

e-Builder Administration

- When deleting reports that have user subscriptions, administrator will see names of users that are currently subscribed and a button to press to delete and add new subscription(s).

Once pressed administrator is able to subscribe a new report for all those users ensuring that subscriptions that need to be replaced are accounted for.

- Copy user now also copies custom field values from the copied user saving you administrative time.
- When applying templates if the Users checkbox is checked within the project template, we now include the users from the template project when selecting default users for a role in the schedule template. This will save you time when applying a project and schedule template simultaneously that meet this condition.