

## **e-Builder 7.7 Upgrade**

### **The Q4 enhancements feature updates to help you achieve more, faster with e-Builder**

All of these are included in your subscription - the more you take advantage of these and all the other e-Builder benefits, the higher your ROI.

#### **Faster Journal Entries**

Faster and more intuitive processing of journal entries reduces the number of steps and/or mouse clicks required to complete this process.

#### **Cost Management**

#### **Cash Flow**

New options allow you to manipulate cashflow information faster than ever before, making the process of entering information more efficient, without the need for double entry, saving you time, and providing new visibility into more accurate cash flow requirements.

#### **Forecasting**

Eliminate confusion during forecasting, and ensure your project managers are using the forecasting method your organization prescribes, resulting in better, faster forecasts.

#### **Documents Search**

Never forget where you stored a document in e-Builder when you attach it to a form, and make the process easier for people filling out forms. Now you can set up an option for individual forms that allow the user to see the folder you've designated for supporting documentation to be uploaded to.

#### **Reports**

#### **New Report Branding Options**

New branding capabilities for program managers give you the flexibility to format reports to reflect your clients' corporate branding.

## Reports Wizard - Visual Elements

The report wizard has new visual elements that help novices and experts alike understand how easy it is to create a report in e-Builder.

## Improved Log Reports

Faster access to who the actors are for the processes you're managing (such as RFIs, submittals, change management, etc.), saving you time, and providing additional visibility for your OAC meetings.

## Planning Data Exchange

When using e-Builder as a planning tool, but need to export budgets to Excel for further manipulation, you can now export this data and retain the formulas in the Excel file created so as not to have to recreate the work you've already accomplished.

## Administrative

New security measures allow administrators to control what rights a project manager can have if they are granted rights to create budgets for new projects. Since e-Builder administrators can delegate other people the rights to create new projects, it is important that these folks don't have more rights than is necessary, ensuring tighter compliance measures are met.

## Documents - Improve Search

Find attached documents faster in email-enabled folders - new option allows you to designate a separate folder where attachments to email will be housed so that you can take advantage of e-Builder's sophisticated search capabilities.

## Forms

### No more work lost

Auto save mechanism ensures you don't lose any work if you need to step away from your compute. Some examples of where this may save you some time and grief includes RFI, change order requests, action items, and other forms.

## Re-opening Forms

- Eliminate churn and confusion occurring from opening an instance of a close form - in some cases, forms are reopened to make minor modifications. In this situation you now have the option not to notify participants in that process unless you require their input again.
- Keep items on the clock by resetting a due date for items that need to be revisited - for instance, if during an OAC meeting you discover that an issue that was previously considered resolved is not, you can now reopen the form related to the issue and reset the date, giving everyone visibility into due date, and ensuring people can be held accountable.

## Cash Flow Data Entry Improvement

When entering cashflow projections, automate the process of enabling 'payment lag' related to any purchase event like a payment application, purchase order, or other contract.

## Faster Access to Document and Files

Improved navigation in the documents module makes the process of downloading, moving, or copying files much easier and faster.

## Contract Approval

Automate the linking of hard copies - e.g., signed contracts, pay applications, change orders, or other processes - to the cost item associated with that process.

## Invoice Approvals

- New invoice approval checks and balances allow you to quickly check whether your available funds can be disbursed, lowering the risk of over committing.
- Speed up the time it takes to mark invoices approved and paid by having accountants or controllers directly mark invoices paid, speeding up invoice status updates which gives you access to more accurate actuals and cash flow information.

## Visibility Into Attachments

New tab gives you immediate visibility into attachments associated with a form (RFI, Action Item, Project Issue, Change Order Request), especially useful with forms that have a lot of comments so that you no longer have to scroll through all comments to find an attachment.

## Submittals

- You can now process submittals faster by attaching files to multiple submittals in one screen.
- When submittal approvals and updates occur outside of e-Builder (e.g., via email), administrators have the option to let the contractor submittal coordinator update these dates based on real world circumstances. The submittal item history keeps track of these updates (who changed the date and when) automatically.
- Add items to submittals from within the **submittal package** screen for additional time savings.

## Submittals Process Improvement

- If you manage the submittals process in e-Builder, it's now easier to create a complete record of transmittals, where you can now upload a transmittal to a package with one click.
- You can reopen closed submittal packages as needed while maintaining an audit trail of the person who reopened, and the reason why they reopened it.

## Submittal Package Log Report

The submittal package log report and package views now includes a held by column that shows all users (separated by commas) of who's court each item in the package is currently in. No longer do you have to click in the details of each item in a package to see who's court each item is currently in, saving you time in managing the process.

## Collaboration with External Users

When inviting an external user to participate in the approval of a submittal item you are required to select a folder in the document repository in the event the user uploads a document (such as a markup to a shop drawing). In the event that there is always one folder in the documents module that will receive these uploaded files there is now an

option in the settings menu to set a predefined folder every time external participation is requested. This will speed up the workflow since you no longer will be required to find the same folder every time.

## **Meeting Minutes**

To support this process, you now can attach documents directly to meeting items right from the meeting items grid. Click on the Attach link and once attached a paper clip icon will show. Meeting attendees can click on the paper clip icon to view and download the documentation attached.

## **Action Items**

Meeting coordinators can now stage action items to fire off for meeting item discussions. Meeting coordinators can save the action items as drafts and they show in the meeting items list. Once the minutes are approved, the coordinator can open the action items up and submit them right from the minutes screen, speeding up the meeting minutes process.

## **More Information on Printouts**

When printing meeting minutes, those meeting items that have action items will show more information about those action items, such as the subject, author, held by, date due, and status, ensuring all the pertinent information is included for meeting minutes distribution.

## **See the Information That's Specific to You**

New Meeting Minutes capabilities help you access the information you need during meetings, and organize information in the way that is most relevant to your role, making the review of action items an easier process.

## **RFI Management**

- During pre-construction, you and your bidders can now review questions and supporting documents faster, in a more collaborative environment that also allows you to export/print documentation linked to specific bid items. You can then be assured that bidders have the best information possible to provide a better response to your bid.

- If you collaborate using e-Builder, the new one-stop print capability for RFI files lets you print and/or download multiple files associated with an RFI at once, so you can get this information quickly, as you need it.
- Review comments made from the various team members (contractors, architects, engineers) immediately through real-time email notifications as RFIs are routed, speeding the process even more.

## **Flexible External Forms Comments**

Improve collaboration by enabling non-e-Builder users the ability to comment on forms externally, after the response date has passed, based on your criteria.

## **Bid Distribution and Management**

Need to get the bid scope approved before sending out the ITBs? Keep the bid process on time. You can now export to excel the defined bid scope in e-Builder for quick approval.

## **Bid Scope Creation**

You're able to setup your bid package faster, since now when you're defining a bid scope you can create time-saving templates, and/or import the schedule of values from Excel, freeing up even more time for you to focus on other activities.

## **Cost Management**

### **Processes with Cost Data**

You can now gain new visibility into cost events related to specific processes, all in one report. For instance, if you currently manage the AFP process via a process then all fields on the AFP form (including the invoice total) is included in one report for consumption.

### **Filtered Views for Confidential Info**

Maintain confidentiality for cost items through different processes without impacting those that need visibility. New settings for processes that include cost data let you filter which people in that process should be able to see this cost data vs. those that shouldn't.