RELEASE NOTES

Version 2021.3.0 Mar 22, 2021

INTRODUCTION

This document describes the features included in version 2021.3 .0 release of the ConstructConnect Platform.

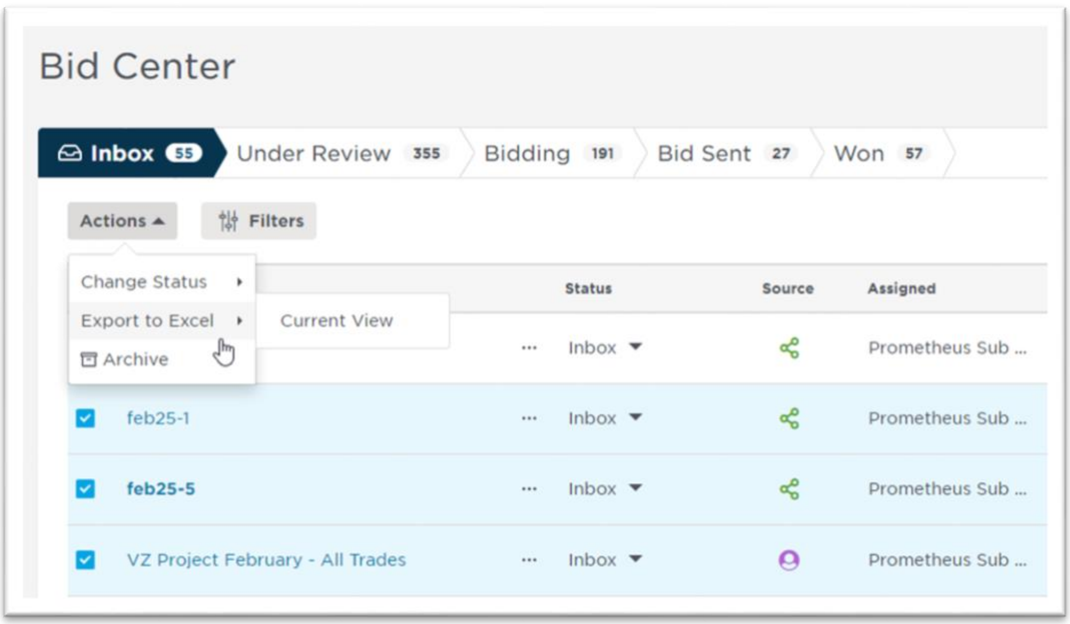
CONSTRUCTCONNECT PLATFORM

BID CENTER

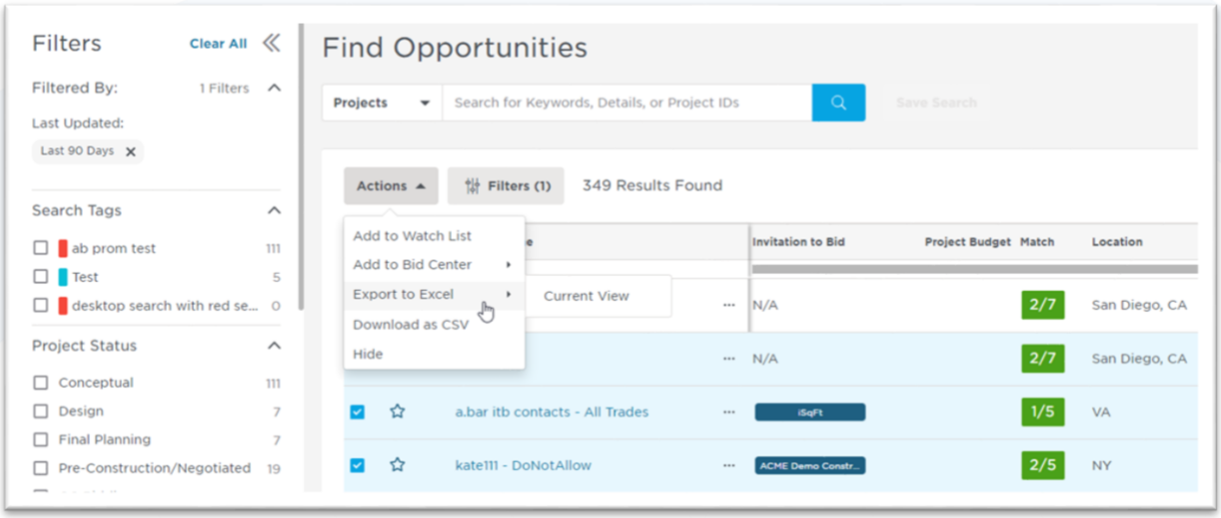
Excel export of project lists in Current View is now available on grid views

- ✓ **<u>Value:</u>** Users can now export project lists in the Excel format.
- ✓ **<u>Value:</u>** Users can quickly share or print project lists in their preferred view.
- ✓ **<u>Value:</u>** Users can select columns, their order, and sorting for the Current view of the project list that will be mirrored in the export file.
- ✓ **<u>Value:</u>** Exports are available on the Bid Center grid, Search, and Watch List.
- ✓ **<u>Value:</u>** Exports are immediate, so users don't have to wait.

Bid Center: Excel Export of Current View



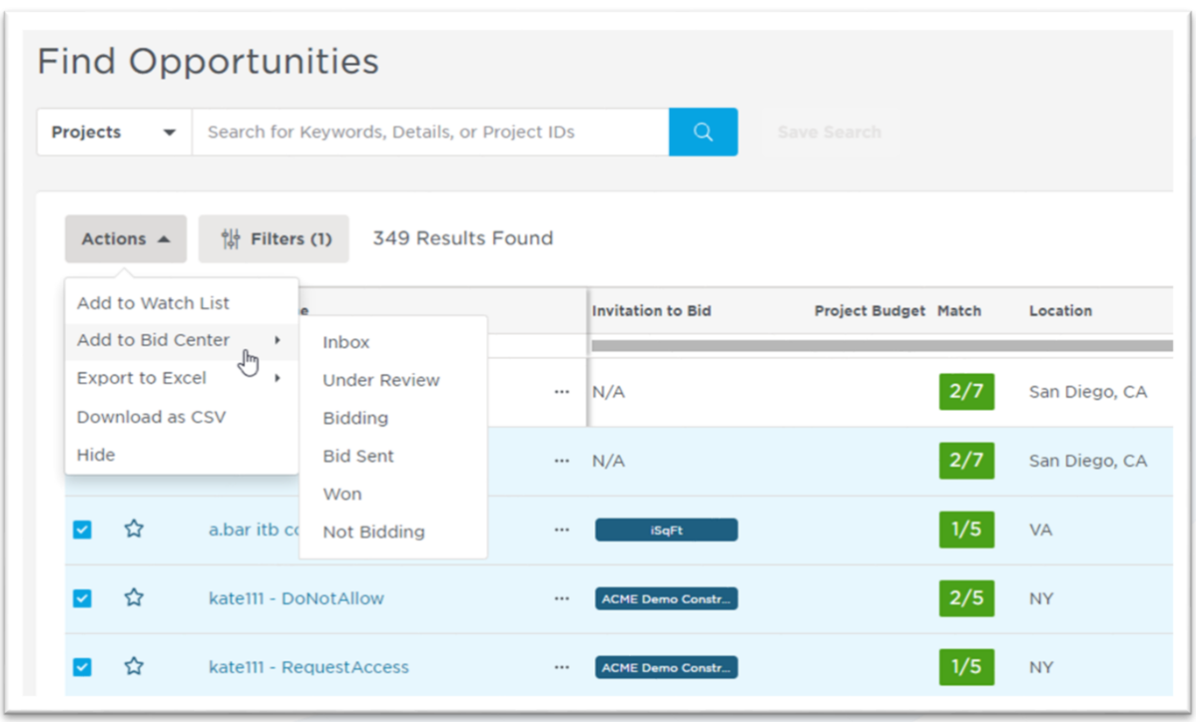
Search & Watch List: Excel Export of Current View



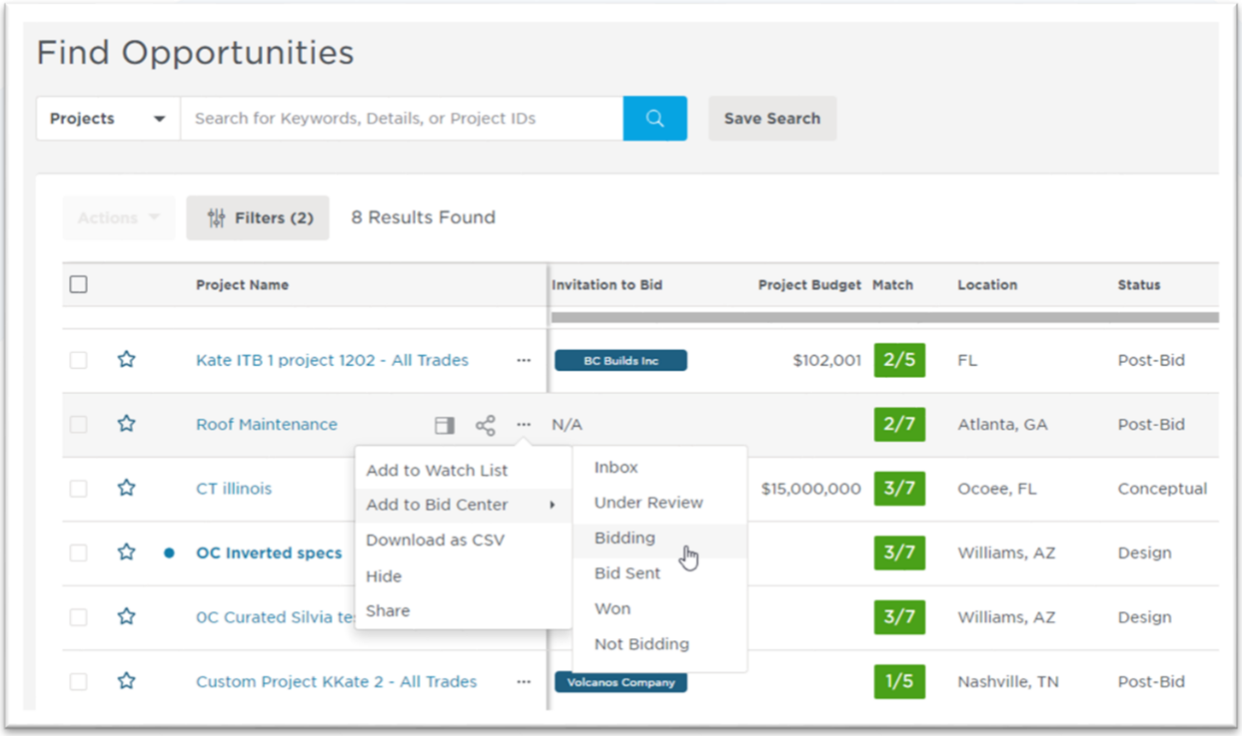
Users can now add projects to Bid Center directly from Search grid

- ✓ **<u>Value</u>:** Users of Search can now quickly add multiple projects to Bid Center directly from search results page without the need to open the Project Detail Page.
- ✓ **<u>Value</u>:** Users can select the target Bid Center status when adding projects to the Bid Center.

Adding multiple projects to Bid Center from Search results page



Adding single project to Bid Center from Search results page



Improved Quick Search for Bid Center grid

- ✓ **Value**: Bid Center users can now match their keyword to all the columns and not just to the project title
- ✓ **Value**: Keyword match runs automatically right after the first character is entered so projects are filtered immediately

Improved error handling for Project Detail Page section loading

- ✓ **Value**: Bid Center users can now see our standard Load Failed messages with information of what exactly failed to load and an option to retry loading
- ✓ **Value**: Saving of affected sections is automatically disabled to protect data integrity

Bid Center Quality Improvements

- CSV Export now populates Start Date and End Date values.
- Web app now runs mobile saved searches properly.
- Multiple responsiveness related issues have been resolved.
- When adding an event in a custom project and navigating back to Bid Center the page will no longer reload.
- When opening a project link from Recent Projects you will be taken to the correct project every time.

PROJECT INTELLIGENCE

DPU (Daily Project Update) emails were changed so that the search button opens ALL search results

- ✓ **Value:** Makes emails a more convenient entry point into the application.
- ✓ **Value:** Emails will only open the project search results for the search tag you are clicking in your email.
- ✓ **Value:** Get to the project results you want with a single click.

Added the capability to sort by square footage numerically

- ✓ **Value:** Sort on square footage to easily see the largest or smallest projects by area.
- ✓ **Value:** Fixes a missed requirement where square footage was not sorting numerically.

Bid type has been removed and projects can be filtered to show “Service, Maintenance, and Supply” projects.

- ✓ **Value:** Removes clutter from unused project types.
- ✓ **Value:** Allows users to include ITBs in their project type filters.
- ✓ **Value:** Users can apply the Service, Maintenance, and Supply filter to quickly find projects with service contracts.

Project Intelligence Quality Improvements

- ConstructConnect Takeoff (CCTO) Walk-Up Trial button displays the proper text if you have signed up for a trial.
- “Send to Takeoff” button is disabled for projects that users don’t have access to because of folder permissions.
- Search results page is refreshed when a user clicks a new search from the Recent Searches section of the search flyout.
- Back end error cleanup and performance improvements.
- Location information is displayed on PDF.
- Pre-Construction/Negotiated value for Project Status filter displays full text.
- ConstructConnect Takeoff (CCTO) user sees banner for ITB projects notifying them that projects have not been formatted.
- ConstructConnect Takeoff (CCTO) trial user sees tooltip notifying them that a project is older than 180 days.
- Cleanup of project event dates so that dates make sense chronologically and display accurate data.
- All counties are saving properly for saved searches based on your subscription.
- Build Your Profile modal properly displays states when there are more than 4.

BID MANAGEMENT

PreQualification Results

If you are provisioned with Prequalification (ConstructConnect Risk Management – aka CCRM) along with ConstructConnect Bid Management (aka CCBM) you can now see your subcontractor PQ form section fields in your Trades and Coverage and All Bidders grids. To support this release has following enhancements:

- New and intuitive “Customize Columns” flyout
    - Three easy to use tabs for Standard Columns, Prequal Columns and a tab to order your columns
- Your grid will update in real time

Value Prop: Now estimators and Bid Coordinators in CCBM can leverage the prequal data in prioritizing and evaluating bidders in their active precon projects.

Roles and Permissions

With this release, admins in the ConstructConnect platform can assign roles to their internal users and can control what application-level permissions are given to those users. An enhanced “User Management” page in our Bid Management module allows admins to assign or remove licenses and assign roles to users. Please see details in the following subsections.

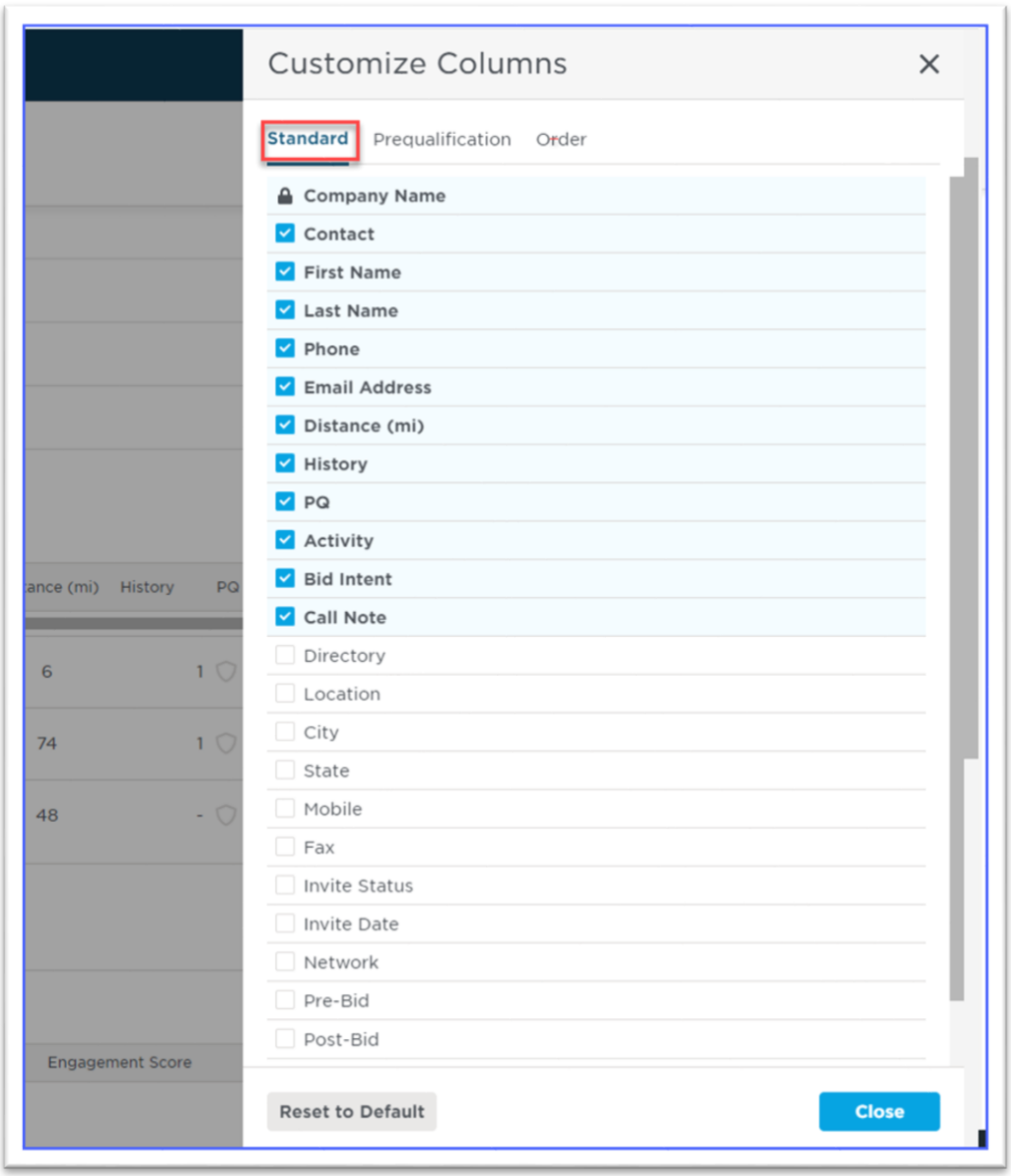
Value Prop: Now multi-user account admins can ensure that the right people in their organization is entitled to right products; allowed to see and work on right kind of precon workflows; through ConstructConnect Roles and Permissions feature. Also, it helps secure key financial, operational and safety data by limiting it’s access to the necessary users only.

Bid Management Quality Improvements

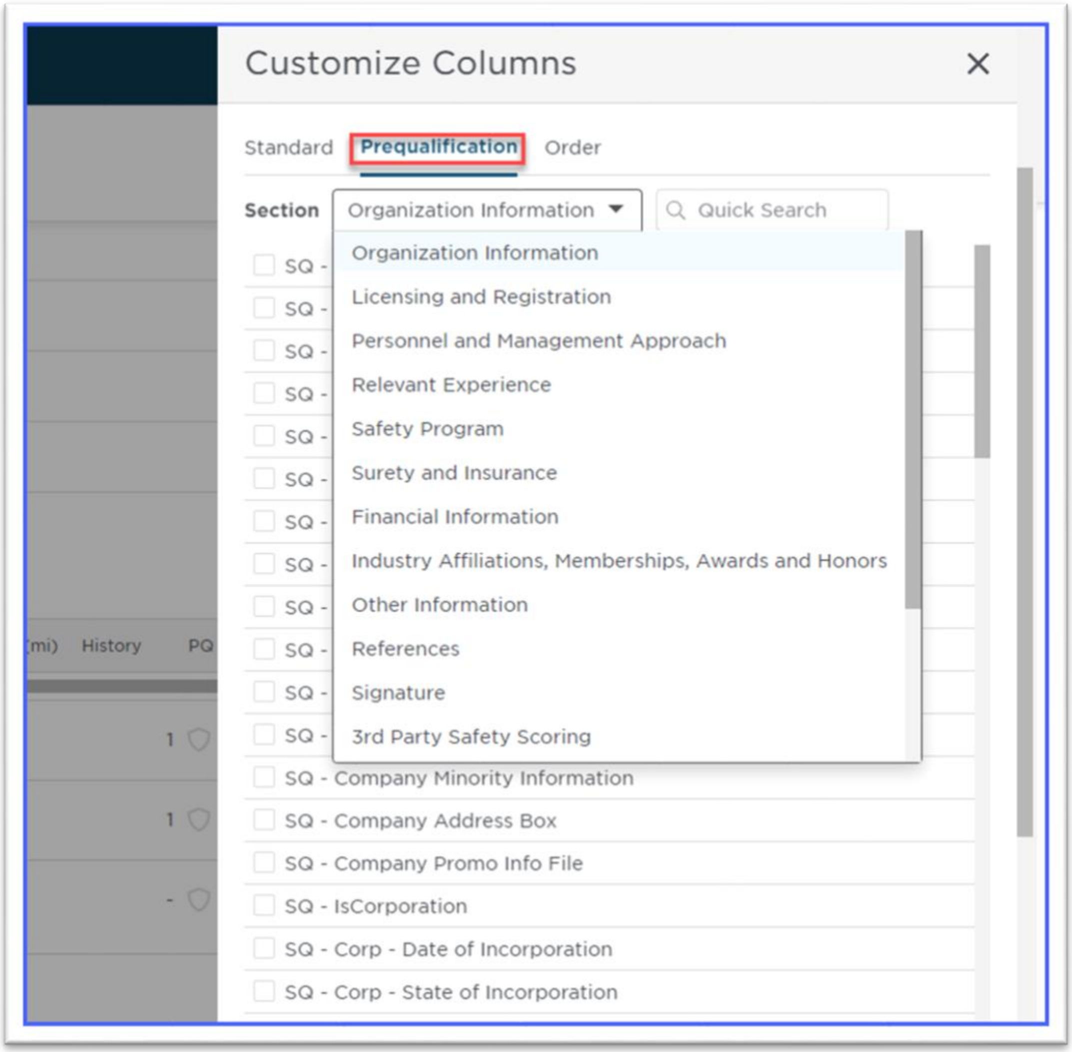
- You can set permissions on a document folder created in a Bid Package
- You can revert a permission to allow all bidders access to a document folder on a single package project, when it was previously set to “Internal Use Only”

Customize Column Flyout for Manage Templates

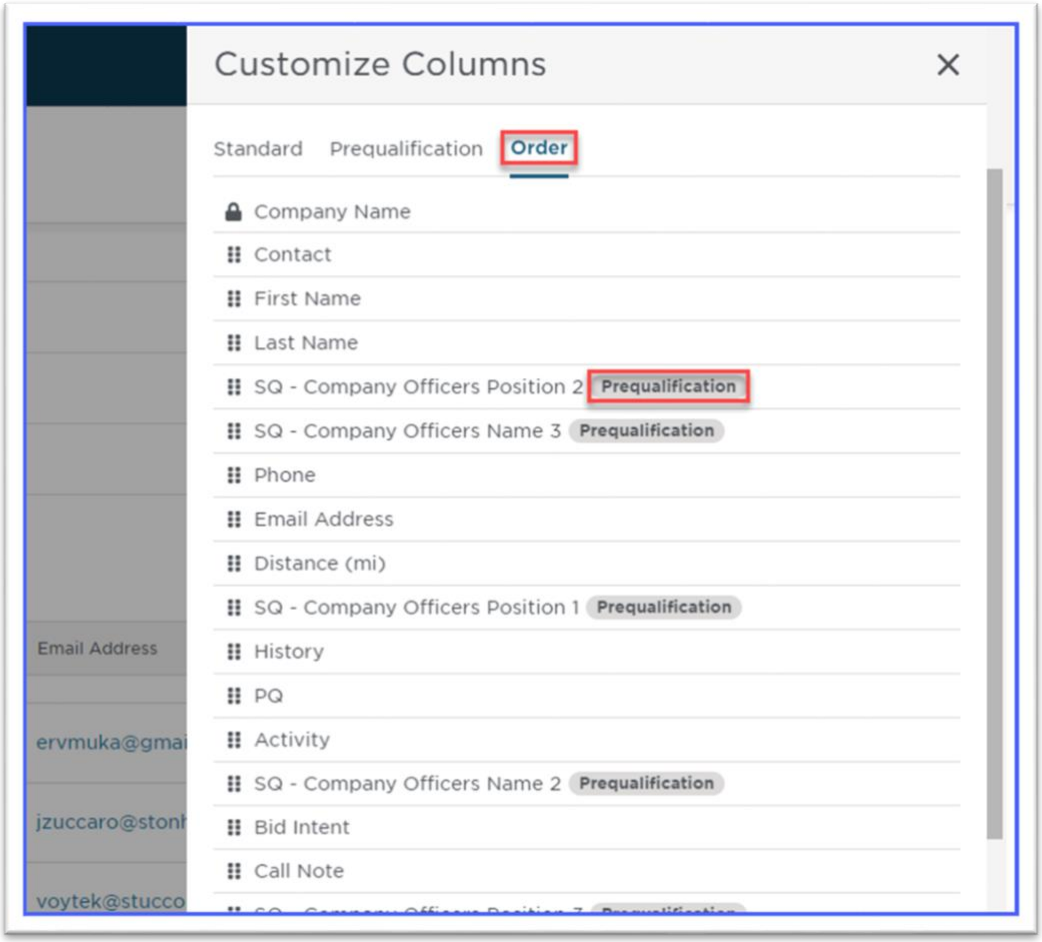
- The flyout is accessed the same way the old modal was accessed
- The flyout has three tabs
    - **<u>Standard</u>** – This allows you to choose the standard columns (of contact and project level fields, as they were in Bid Management today) you would like displayed in your grid



- **Prequalification** – Here you will be able to select the section and fields from your Prequalification form that you would like displayed in your grid
- If there are too many fields in a section, you can type a string in the "quick search" field to filter the list and select with ease.



- **Order** – On this tab you will be able to arrange all of your columns in an order that makes sense for your workflow
    - Notice that any Prequalification columns are noted in the flyout.

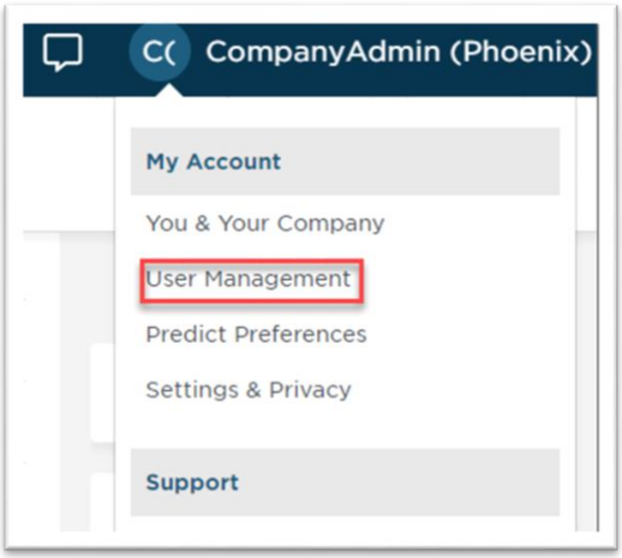


Other Customize Column Flyout Tips

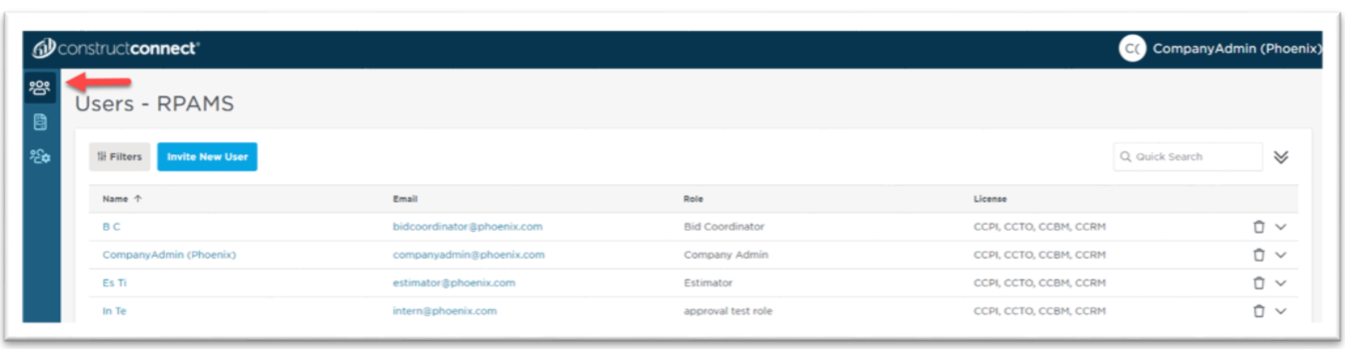
- Reset to Default – This button will reset your selections to the default column set that has been recommended.
- Closing the flyout – This can be done by clicking "Close", Clicking on the "X" in the upper right **or** by clicking anywhere on the screen outside of the flyout
- Updating your grid – updates are completed in real time. As you make selections in the flyout, your grid is updated in real time.

Roles and Permissions – As a Company Admin you will be able to manage application-level permissions for users in your company by assigning them a specific role.

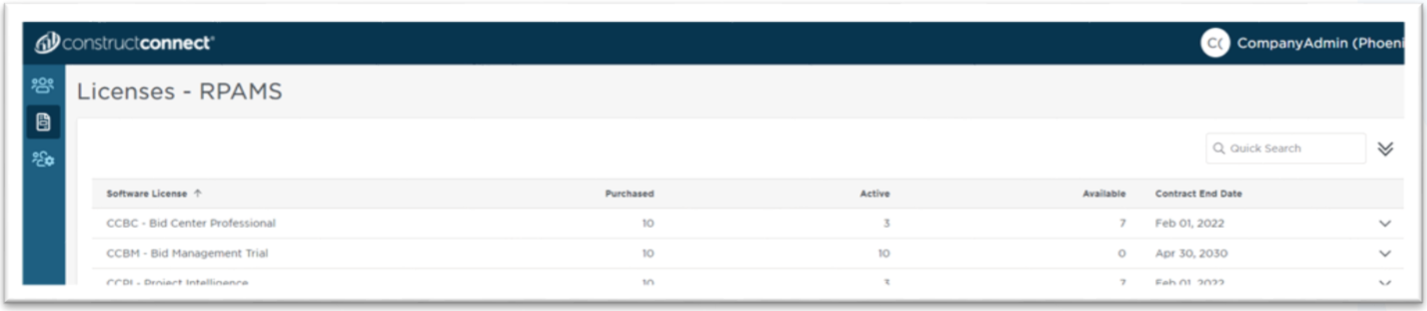
- You will access this by clicking on your name in the upper right of the screen and selecting “User Management” in the drop down under “My Account”



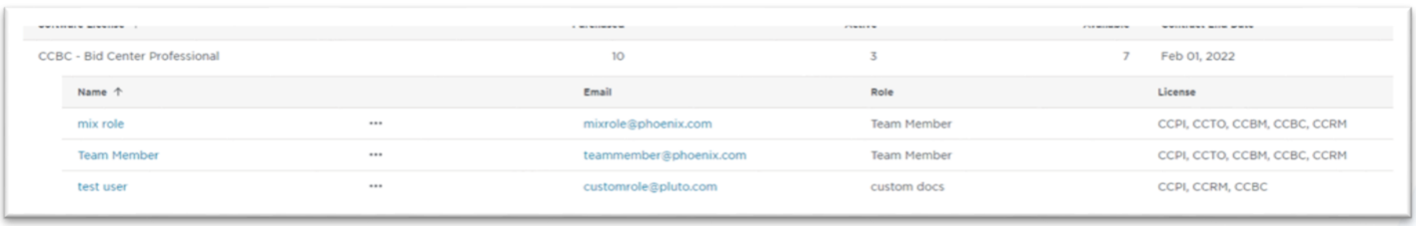
- Users within your company
    - This is the first selection in the left rail
        - Here you can:
            - Invite new users
            - View users in your company along with their Roles and License



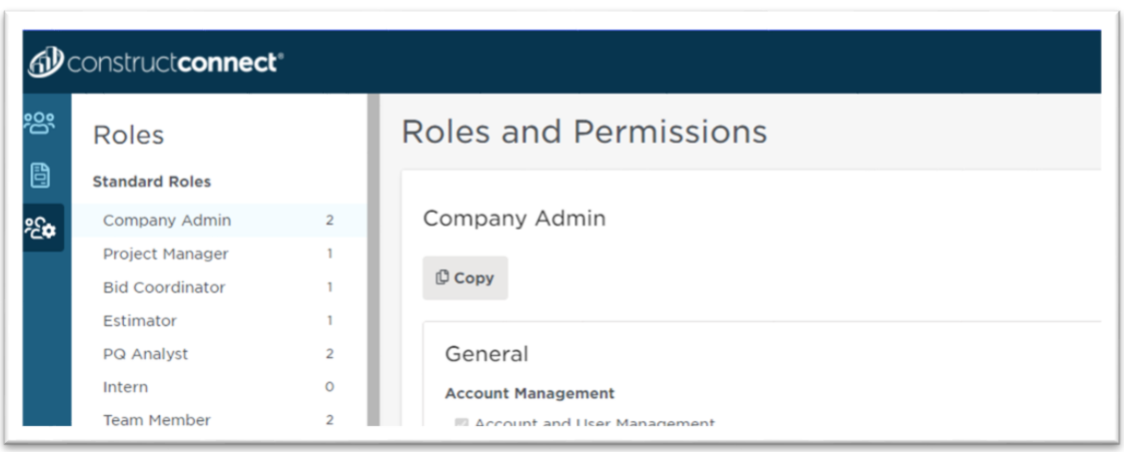
- By clicking on the License icon on the left navigation you can view number of licenses for each product for your company and how many were assigned and how many are still available



- By expanding the license section, you are able to see what users within your company have that license and the length of the contract for the license.



- When you click on the bottom icon on left hand navigation, it presents you with a list of roles applicable for ConstructConnect Platform
- In the March release, these are a fixed set of standard or default roles that you can assign to your internal users.
- Each role also displays a number. It represents how many users have been assigned that role within your company.



- When you select a role on the left hand side, you can see the permissions assigned for that role on the right.
- These permissions are broken down by product or workflow group, starting with “Company Admin Workflows” which will be available to all CC Platform users.
- If your company has entitlements for CCBM (Bid Management) or CCRM (Risk Management) or CCTO (Takeoff), or CCPI (Project Intelligence) each one of them shows up as separate permission set.
- In this release, these permissions and roles are non-editable (Configurable roles are in one of the upcoming releases).