

# **RELEASE NOTES**

Version 2021.6.0 June 10, 2021

#### **INTRODUCTION**

This document describes the features included in version 2021.6.0 release of the ConstructConnect Platform.

## CONSTRUCTCONNECT PLATFORM

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Bid Center	
Calendar view is now optimized for users on mobile devices	
Detailed Excel export of projects now includes direct links to Project Detail Page (PDP) and Company Detail Pa (CDP)	ige
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#### **BID CENTER**

## Calendar view is now optimized for users on mobile devices

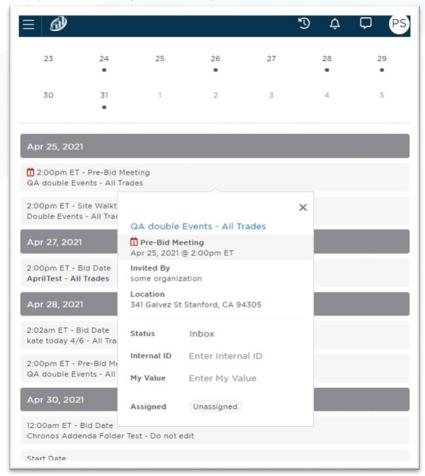
• ✓ <u>Value</u>: Users on mobile devices like tablets and mobile phones can now comfortably use the Calendar view of the Bid Center

#### Bid Center: Calendar View on mobile screens





## Fully functional Project summary card



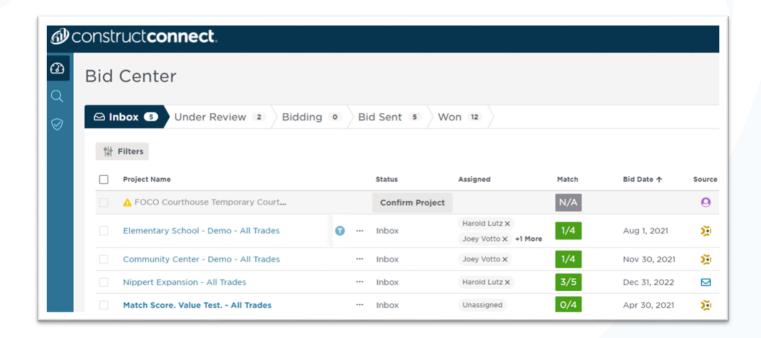


Detailed Excel export of projects now includes direct links to Project Detail Page (PDP) and Company Detail Page (CDP)

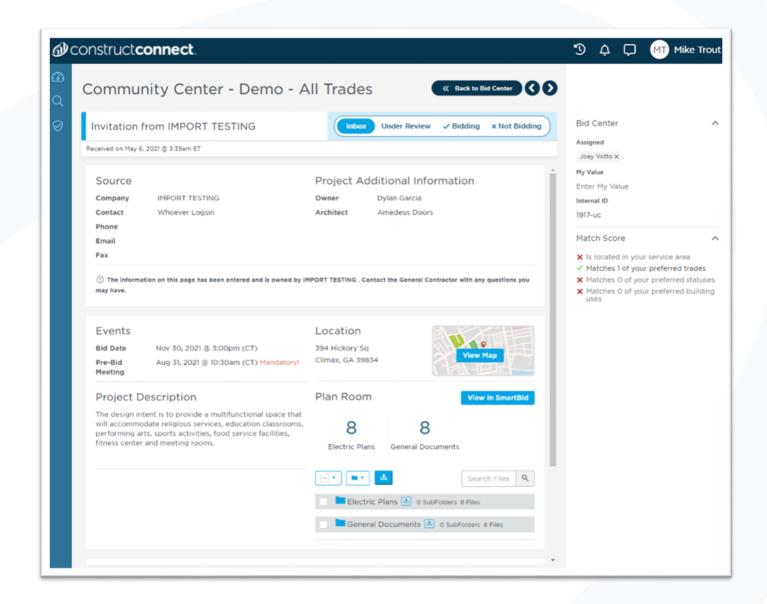
• ✓ <u>Value</u>: Users can quickly open PDP and CDP directly from the exported file

## SmartBid invitations to bid are now in your Bid Center!

- Value: Your SmartBid invitations to bid now appear in your Bid Center Inbox like your other invitations.
- Value: View SmartBid invitation to bid project page in Bid Center where you can see all the project details, download documents, assign team members, and reply to invites by setting your status.
- ✓ <u>Value</u>: Manage your SmartBid invitations alongside your other projects in Bid Center.



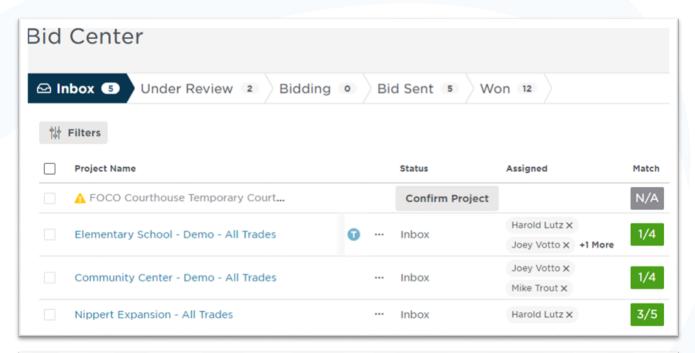


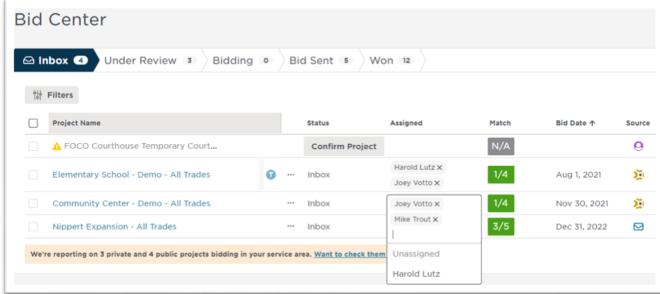




## Assign multiple people to a project

• ✓ <u>Value</u>: You can now assign multiple team members to any project in your Bid Center

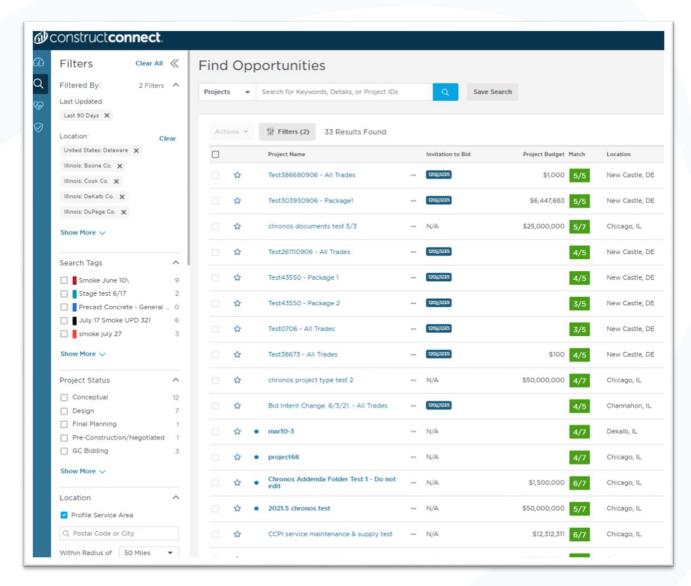






## Filter by Your Service Area

• Value: Easily find the projects or companies that are in your service area.



## Bid Center Quality of Life Updates

- Bid Center load times reduced by up to 50%
- Bid Center table improvements including:
  - o Customize Columns option providing a new way to select/order columns
  - New actions toolbar that appears when you select projects in the table and provides possible actions you can take on those selected projects



# Bid Center Quality Improvements

- CSV Detailed Excel export file now has cleaned up date and currency values.
- Shared custom projects that include documents can now be sent to takeoff.



#### PROJECT INTELLIGENCE

## Project Intelligence Quality Improvements

- When utilizing project Print to PDF all bidders are now included in the contacts section.
- Resolved multiple issues with Takeoff Trial when trying to view on tablets and mobile devices.
- When starting a Takeoff trial using a table or larger mobile devices you will now be able to view the Takeoff Trial video properly.



#### BID MANAGEMENT & RISK MANAGEMENT

Managed projects – Bid Package Consolidation

**Value Prop:** You are now able to view a list of your managed projects instead of a list of Bid Packages. This will remove the frustration of scrolling through multiple Bid Packages to get to the project you would like to work on.

## Prequalification Scopes in Bid Management

<u>Value Prop</u>: The PQ Scopes workflow is now available in CCBM at the project level. This streamlines the project budget process by enabling you to manage your project in one place without having to switch back and forth between applications.

## Prequalification Data in Bid Management

<u>Value Prop</u>: You are now able to view your Trade Contractors PQ Form status in both the All Bidders and the Trades and Coverage grids. You also have the ability to send a Prequalification request from the new column or from the Trade Actions drop down menu. This new functionality allows you to easily manage your prequalification needs while within a project, saving you time and increases your efficiency.

## New Grid Design in Bid Management & Risk Management

<u>Value Prop</u>: You can now see the table in the view that works for you, with the columns sorted, arranged, and sized according to your preferences. This saves time and increases productivity. The settings are remembered and automatically applied the next time you load the page..



## Bid Management Quality Improvements

- Permissions to manage estimators has been tied to Manage Trades and Coverage permissions
- Updates have been made for an ITB relating to a bid package to display the start date to that Bid Package instead of
  the start date for the project
- Office location is no longer a default filter on the Bidder Search.
- Within the Documents tab three dot menu, the options to rename or delete a folder have been updated to reflect either
  a folder or a document.
- When attempting to push a project to Procore you would get a continual loading screen. This has been fixed and you can now push your project to Procore
- When attempting to move to the next page on the All Bidders tab it would appear that you landed on Page 2 however the list of bidders was the same as Page 1. You are now able to page through your list of bidders.
- During the creation of a project you may see the Building Use field displayed over the top of the list of similar named projects to the one you are typing. This has been corrected and will now display the list properly.

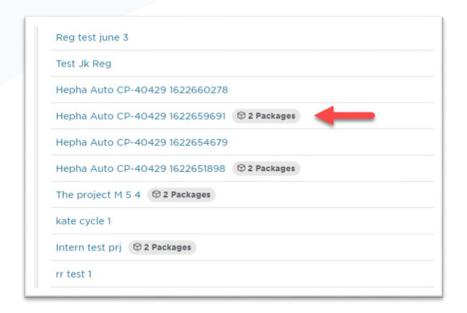
## Risk Management Quality Improvements

- Multiple updates to permissions have been made within Risk Management including:
  - o Form edits are now enabled by permissions provided in the User Management Portal
  - Only users with the ConstructConnect permission to send a Prequalification request will be able to send the request within Risk Management.
  - Notes on the form page are now enabled for only those with the permission to View/Edit, View/Approve or View/Edit/Approve.
  - o iSqFt permissions are no longer applied to functionality in Risk Management

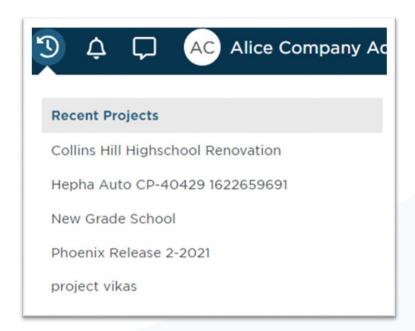


## Managed Projects – Bid Package Consolidation

- Now, only Projects are displayed in the Managed Projects Grid.
- Bid Packages are consolidated under each Project and the number of Bid Packages are displayed next to each project.
- If a project does not include any bid packages, no bid package count will display.
- Clicking on a project will open the project at the project view.



• Recent projects will display Managed Projects and not Bid Packages.





• Search will display Projects and not Bid Packages



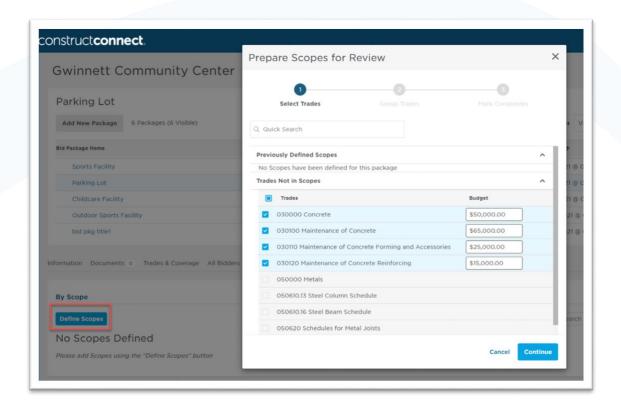
## Prequal Scopes in Bid Management

• New PQ Scopes tab will display if you are provisioned with CCRM and CCBM



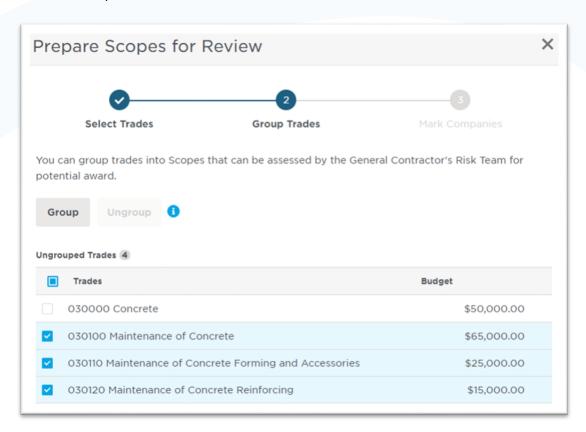
- Define Scopes:
  - You are able to define your scopes by clicking on the "Define Scopes" button which opens the Define
     Scopes Modal
  - On the first step of the process, you can update trade budgets which will automatically roll up to the Scope budget.

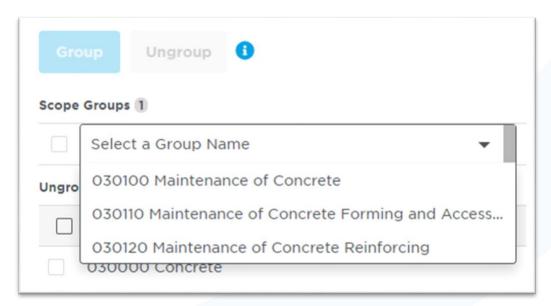






• In step 2 you are able to group your trades under a scope and selecting the name of the scope from the list of trades names in the drop down.



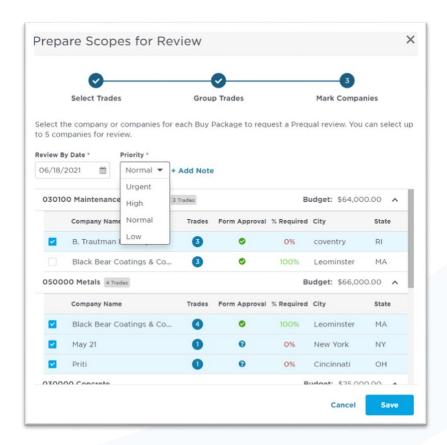




• If you realize that the group is not correct, you do have the ability to ungroup the trades and update the scope by reorganizing them how you would like.

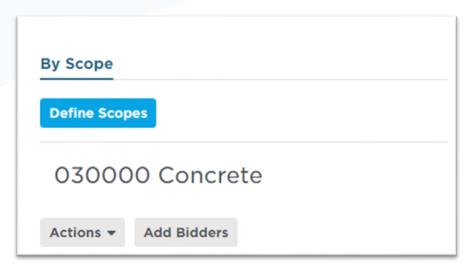


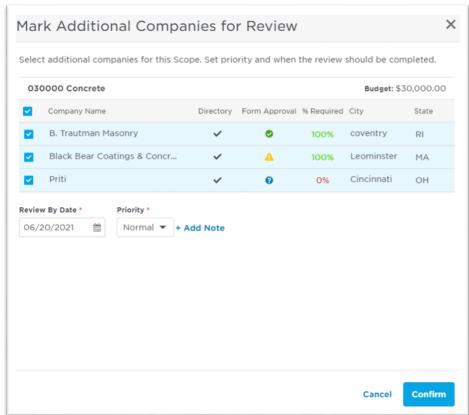
- In step 3, you can:
  - Add Companies to your scopes (5 companies can be added at a time)
  - Set a review by date
  - Set priority
  - Add notes (A note will be required if priority is set to urgent)





- After you have completed defining your scopes, if you determine that you need to add additional companies for review, you are able to select the "Add Bidders" button which will open a modal to Mark Additional Companies for Review"
- This process is identical to step 3 of the Define Scopes process

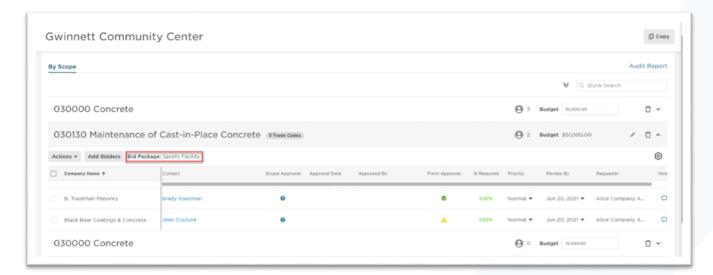




• Project View Grid:



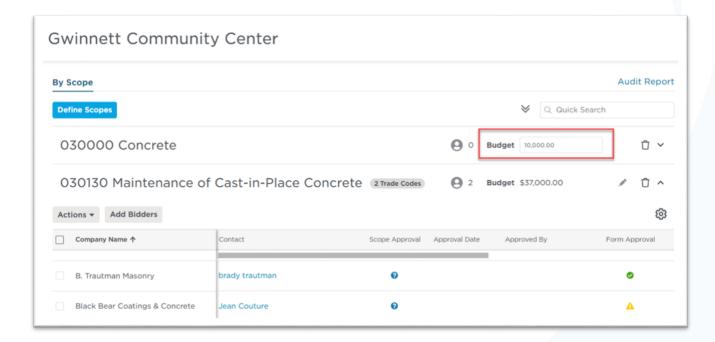
- O Gives you a wide view of all the scopes on your project
- o Each scope will display the Bid Package (if you are using Bid Packages) that the scope is associated with
- Functionality on this grid includes:
  - Edit Budget:
    - For a single trade scope you are able to use the inline edit on the budget field
    - For a multiple trade scope, click on the pencil icon which will open an "Edit Budget" modal.
  - Delete Scope:
    - Click on the "Trach Can" icon which will open a "Delete Scope" modal
  - Both Priority and Review By Date can be edited within the grid by clicking on the drop down
    - If you need to set priority to Urgent you can use the "Add Note" functionality as a note will be required for an Urgent priority
  - To add a note for a scope, click on the blue note icon which will open an "Add Note" flyout.
    - Here you are also update the Budget and the Review by Date
  - After selecting multiple companies within a scope, you can delete them from the scope in the "Actions" menu.



- Package View
  - o This view will display only scopes within the Bid Package you are currently working on
  - Functionality on this grid is identical to the project view and includes:
    - Edit Budget:
      - For a single trade scope you are able to use the inline edit on the budget field
      - For a multiple trade scope, click on the pencil icon which will open an "Edit Budget" modal.



- Delete Scope:
  - Click on the "Trach Can" icon which will open a "Delete Scope" modal
- Both Priority and Review By Date can be edited within the grid by clicking on the drop down
  - If you need to set priority to Urgent you can use the "Add Note" functionality as a note will be required for an Urgent priority
- To add a note for a scope, click on the blue note icon which will open an "Add Note" flyout.
  - Here you are also update the Budget and the Review by Date
- After selecting multiple companies within a scope, you can delete them from the scope in the "Actions" menu.

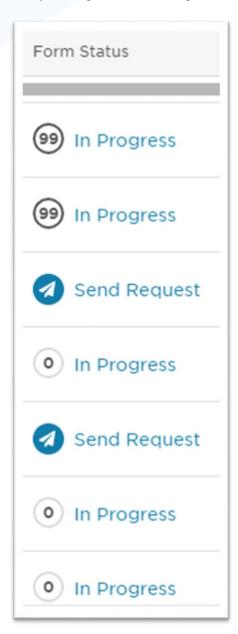




## PreQualification Data in CCBM

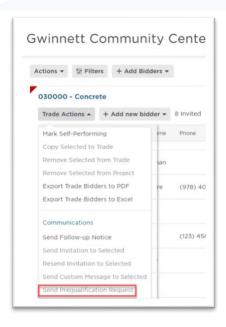
#### **Form Status Column**

- If you are provisioned with Risk Management(Pre-Qual) you can now choose to see your sub contractors Form Status in the Trades and Coverage and All Bidders Grids.
- To view this new column, select it in the Standard tab of the Customize Columns flyout
- By clicking on the "Send Request" link you will be able to send a Prequalification request to a single bidder



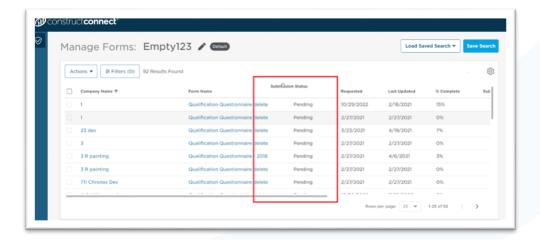


 You are now able to bulk send PQ request from the Trade Actions menu on the Trades and Coverage page or the Actions menu on the All Bidders tab



## New Grid Design for PQ Scopes in Risk Management

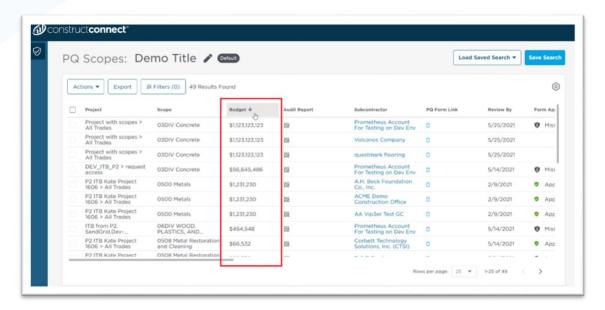
- You can sort standard columns by clicking on the column headers
- Columns can be resized by clicking on the border of the column headers and dragging it to the desired size
- New improved pagination with number of results per page and currently displayed range
- The header and footer are sticky
- All adjustments to the table formatting are remembered and loaded next time user accesses the page
- You can order all columns by clicking on the column headers and dragging them to the desired place



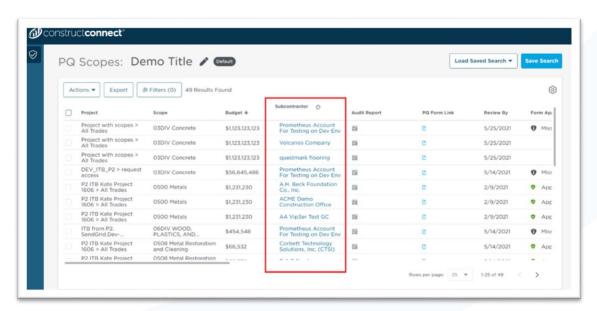


# New Grid Design for Scope Review (Risk Management) and Add Bidders by Search (Bid Management)

- You can sort most standard columns, resize, and reorder all columns directly from the grid
- New improved pagination with number of results per page and currently displayed range
- The header and footer are sticky with comfortable horizontal and vertical scrolling
- All format adjustments are remembered and loaded next time user opens the page
- Sorting columns by clicking on the column headers



You can order all columns by clicking on the column header and dragging it to the desired place





You can resize all columns by clicking on the border of the column headers and dragging it to the desired size

