PMWeb Version 7.1

RELEASE NOTES

Overview

PMWeb version 7.1 includes a wide array of enhancements that make every corner of the platform more powerful and easier to use, including these major new features:

- PMWeb Activity Boards
- PMWeb Inspections

In addition, version 7.1 includes a complete reinvention of:

- PMWeb Document Manager
- Attachments Tabs

This document highlights some of the new and enhanced features that are included in version 7.1. For more detailed information, please contact your PMWeb representative.

PMWeb Activity Boards

For the first time, PMWeb Activity Boards directly integrate the power and flexibility of a Kanban board with a robust construction project management platform. Kanban boards, a key element in agile project development methodology, give stakeholders a central location to identify work to be done, collaborate on the work process, and monitor its completion.
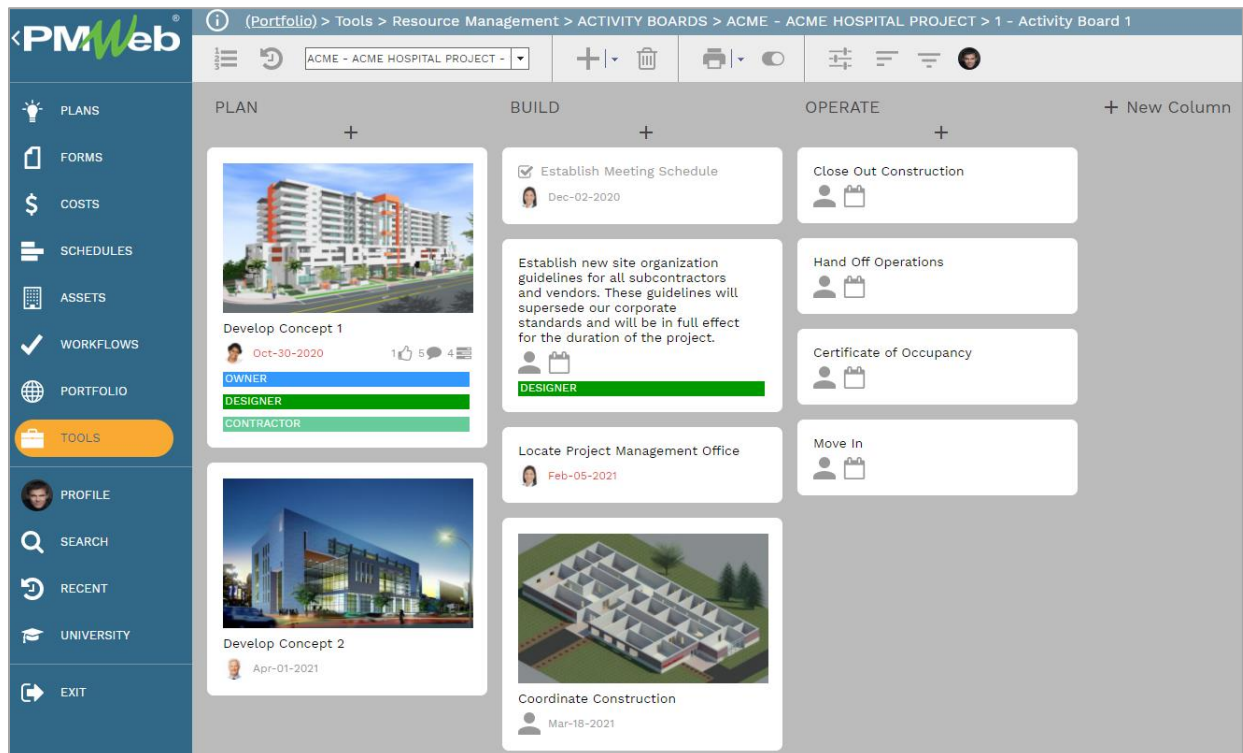

Figure 1 – A PMWeb Activity Board

PMWeb Activity Boards make it simple and easy to create tasks, discuss them with other users, and share progress toward completion. Boards can be created at any time and can represent an entire project or just a portion of one. Best of all, tasks can be directly linked to other PMWeb records, so they can be used to organize anything and everything you do.

PMWeb Document Manager

Through thousands of projects, large and small, PMWeb clients have used Document Manager to store, index, and retrieve millions of electronic files. In version 7.1, Document Manager has been completely redesigned with all new features and a streamlined look.
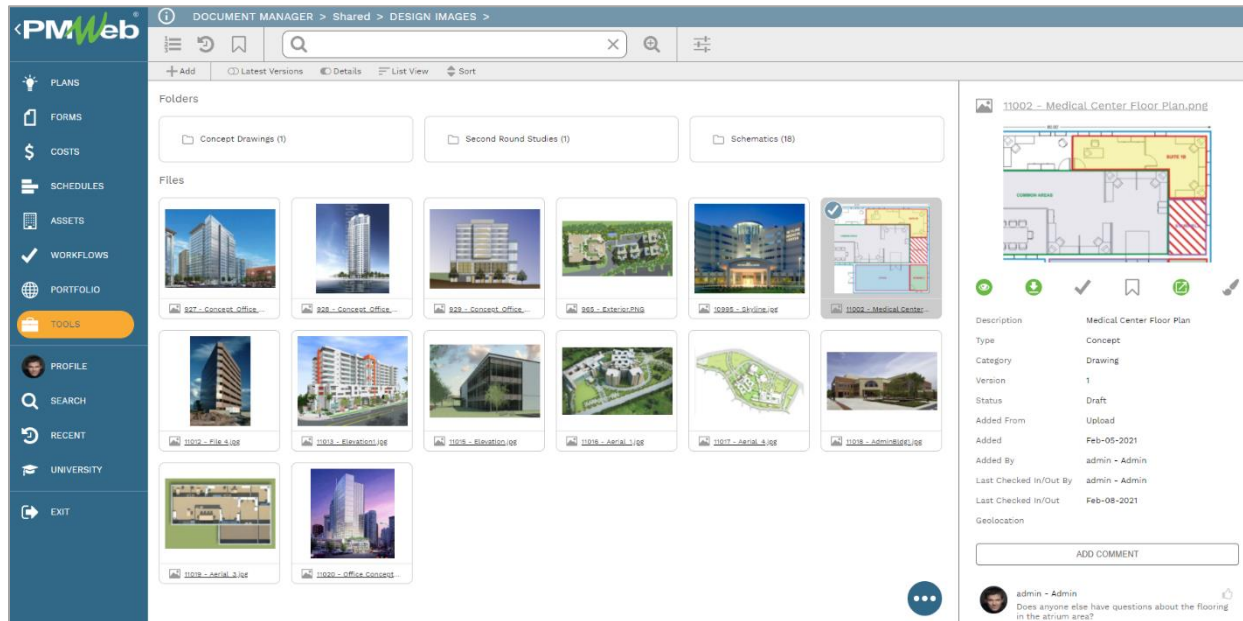

Figure 2 - The Redesigned PMWeb Document Manager

Highlights of the new Document Manager include:

- An all new, file explorer model – The primary (explorer) pane of the window displays the contents of one folder at a time. Double click subfolders to open them.

- Details pane – The Details pane, on the right side of the window, displays attributes of a selected folder or file and interactive action buttons.

- Fully interactive breadcrumbs – Click any segment of the breadcrumbs to navigate to a new location.

- Bookmarks – Users can create their own list of frequently used folders and files.

- Quick and advanced search – Two types of search make it faster to find items and access them.

- Comments log – Create conversations about each folder and file in Document Manager.

- Action buttons – Context-sensitive buttons make it easy to see what actions are available at all times.

- Linked PMWeb records – Each file in Document Manager has a full-fledged PMWeb record behind it.

- Folder groups – Folder permissions have always been granted by user groups and individual users. Permissions can now also be managed by Folder groups, which are combinations of user groups.

- Copy attributes – Quickly copy down attribute data to all files being added.

Attachments Tabs

All Attachments tabs have been rebuilt with the new features of Document Manager, including Card and List View.

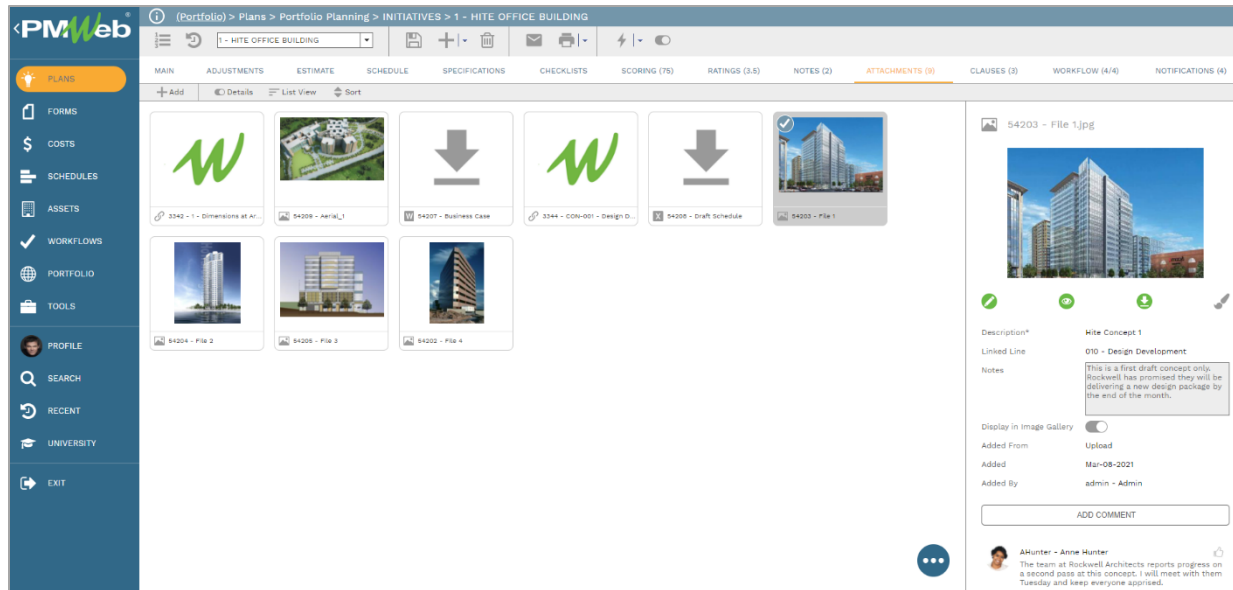*Figure 3 - Attachments Tabs are Redesigned as Well*

PMWeb Inspections

With PMWeb Inspections you can assess the state of anything you want, using criteria that you define yourself. Interactive inspection points can be placed on images if you wish, and you can use an inspection to automatically generate Work Requests, Work Orders, Initiatives, and Projects.
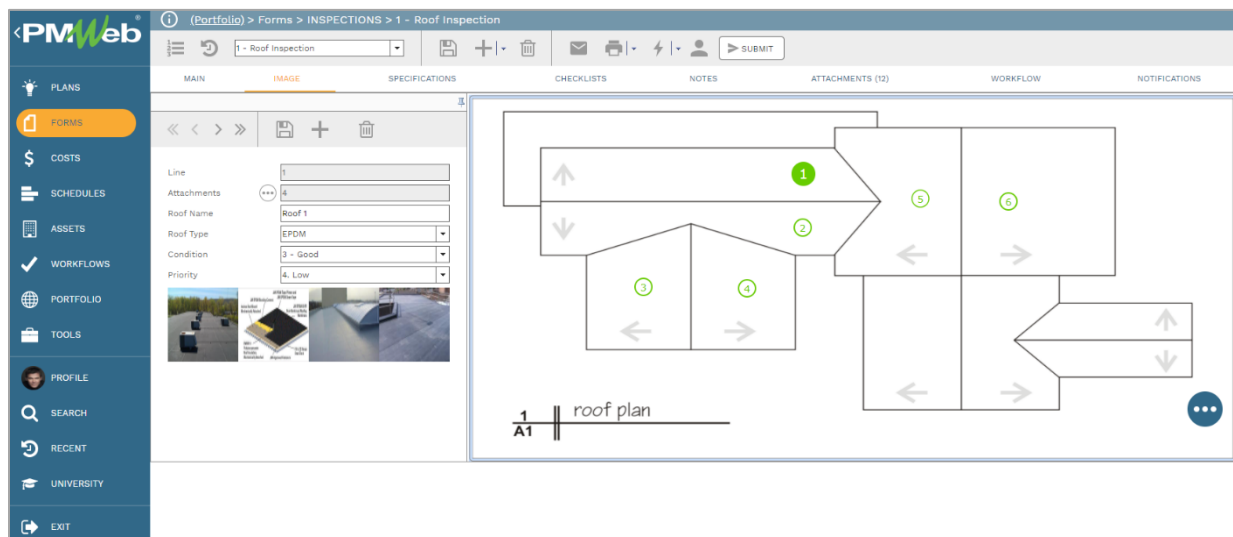

Figure 4 - A PMWeb Inspection Record

New Features and Enhancements

MODULE	FEATURE	COMMENTS
General	Profile button added to Control Panel	Click the Profile button to configure your PMWeb experience
General	Go To BI Reporting Center command added to Print buttons	Click this option to navigate to the BI Reporting Center from any record
General	Copy to Excel and Paste from Excel added to more records	Copy and Paste have been added to all record tables that support them: • Initiatives details table • Portfolio Planning Worksheets details table • Change Events budget table • Change Events cost table • Contract Change Orders • Commitment Change Orders • Miscellaneous Invoices • Journal Entries • Action Items • Meeting Minutes details table • Daily Reports details table • Punch Lists • A/R Payment Batches • A/P Payment Batches
General	Attachments Tabs rebuilt	Attachments tabs in all modules have been rebuilt using the new document explorer model
General	Import Record improvements	Import, for record types that offer it, has been moved from within records to Manager Pages and has been standardized and streamlined
General	Monitor third party SMTP rejections	When sending emails from PMWeb the system monitors settings regarding their SMTP server and notifies the user that limits have been exceeded
Plans	Active / Inactive toggle added to Initiatives	Initiatives can now be marked as inactive, to prevent them from being added to existing records or used in new ones
Forms	PMWeb Inspections added	The Forms module now includes the Inspections record type. (See above)
Costs	Settings to Prevent Duplicate IDs by Vendor in Miscellaneous Invoices, Progress Invoices, and Requisitions	Settings about this have been added to Portfolio/Settings. These settings are at a system, rather than a project, level.
Costs	There is no longer a 999 day limit in the Days field of Contracts	
Costs	Negative payments are now supported in A/R and A/P Payment Batches and Payment records as well as in Payment tabs in Requisitions, Progress Invoices, and Miscellaneous Invoices.	This enhancement is also available in patches for version 6.1 and 7.0.

Schedules	Multiple Resources can be added to multiple tasks in one step	The Resources button lets you assign or unassign multiple resources to or from multiple tasks in one step
Schedules	The Curve field has been added to the Task Details subtab and dialog	
Assets	The number of characters in asset IDs has been increased	Locations, Buildings, Floors, Spaces, and Equipment records
Workflows	Submit Button added to the header toolbar of records	In records that have not yet been submitted to Visual Workflow, a Submit button shows in the header toolbar. Users don't have to visit the Workflow tab to submit.
Workflows	Return option added for DocuSign steps	DocuSign steps in Visual Workflow now offer a Return action option
Workflows	A "Complete DocuSign" button added to the Workflow tab	Document Managers can manually complete a DocuSign step
Workflows	Direct users to the Main tab, rather than the Workflow tab setting	A setting has been added to Portfolio/Settings: "Workflow links direct users to the Main tab rather than the Workflow tab"
Portfolio	Copy User Group feature added to Security	The Define Groups tab now offers a Copy function from the Add button
Portfolio	"System" Tab added to Portfolio/Settings/General Settings	New system-level settings for Document Manager, invoices, and Visual Workflow have been added here
Portfolio	Workflow enabled for Work Requests with no Location	Work Requests that are not linked to a location can be used in Visual Workflow. Define a system-level Business Process for the record type.
Tools	PMWeb Activity Boards introduced	A new record type, PMWeb Activity Boards, has been added to Tools (See above)
Tools	PMWeb Document Manager completely redesigned	The all new Document Manager is sleek and responsive (See above)
Tools	Copy attributes to all files when uploading	A "Copy Down" button has been added to the Add Files dialog.
Tools	Option to manage Document Manager permissions by Folder Groups added	An option to manage folder permissions by Folder Groups, which are combinations of User Groups, has been added to Portfolio/Settings
Tools	UDFs added to Stage Gates	Stage Gates detail lines can now include user defined fields
Tools	Option added to create a Bluebeam session during Workflow	A setting to allow users to create a Bluebeam session while a record is in Visual Workflow has been added to PMWeb Admin/Integrations
Tools	Distribution Lists can be used when creating Bluebeam sessions	The Companies/Contacts dialog now includes the Distribution Lists tab when creating a Bluebeam session
Tools	Use Custom Forms with Projects and Initiatives	You can now designate in Form Builder if a form is to be used with Projects Only, Initiatives Only, or both Initiatives and Projects