



Trimble Unity Construct - My Settings Guide

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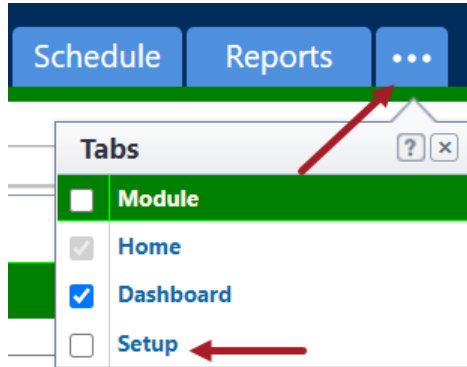
About My Settings

The My Settings section allows you to customize settings relevant to your personal account such as passwords, scheduled subscriptions to reports, access delegation and views.

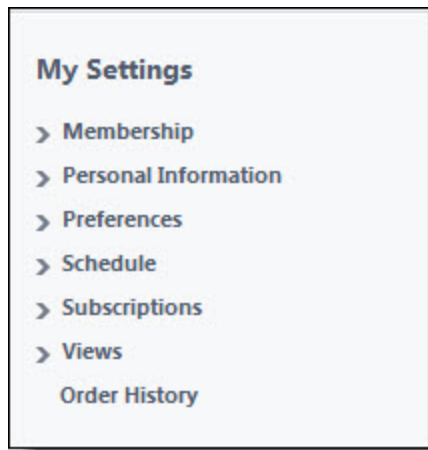
To access My Settings

- From the top navigation tabs, click the **Setup** tab or from the Utility menu by clicking the drop-down arrow next to your user name.

If the Setup tab is not visible, click , and then select the **Setup** check box.



My Settings is the first option in the Left Navigation Pane.



About Membership Settings

The Membership section allows you to see the projects and roles that you are a member of. You may have to double check these settings when troubleshooting to rule out the possibility that you don't have permission to view the desired project information. It's important to know these details of your account membership so you can alert administrators when you feel changes are necessary.

To access the Membership Settings page

1. Go to My Settings.
2. Click Membership.

Project Membership Page

The Project Membership page enables all licensed Trimble Unity Construct users to view a list of projects they have access to. This allows you to verify membership when necessary. For account members with the appropriate permissions, you're also able to add and import projects from this page. Below are descriptions of the fields and buttons located on this page.

- **Add Project:** This button is visible only to account administrators and users with Add New Project permission. Click to add a new project. For instructions, see Add New Projects.
- **Import:** This button is visible only to account administrators and users with Add New Project permission. The import function helps you set up projects more quickly. During the import you'll also be able to apply templates from other areas of Trimble Unity Construct, if available to you:
 - Project Template (Document folder structure)
 - Role Templates
 - Schedule Templates
 - Budget Templates
 - Cash flow Templates
 - Funding Templates

For instructions, see Import Projects.

- **Projects:** This section lists the projects you have access to.

Role Membership Page

The Role Membership page enables all licensed Trimble Unity Construct users to view the roles that they are a member of, at both the account and project levels. This allows you to verify membership when necessary. To learn more about account and project level roles, see About Project Level Roles.

Your Account Level Role Membership

- **Role:** Displays the account roles that you are a member of.
- **Description:** Displays a description of the role, as entered by the account administrator.

Your Project Level Role Membership

- **Role:** Displays the project role that you are a member of.
- **Project Level:** If you're a member of this role at the project level, the number of projects appears in this column. Click to see a full list of these projects.

Project level roles allow a single role to have different sets of permissions across multiple projects. For example, if you are a project manager who is the lead on all hospital projects, but on outdoor construction, you are an assistant PM, you can be in the same role while your permissions are adjusted accordingly. For more information, see About Project Level Roles.

- **Description:** Displays a description of the project role, as entered by the account administrator.

Update My Profile

Your profile data includes all the basic information about you, such as your name, company name and contact information. It's important to keep this information up-to-date so that administrators have access to your current phone numbers, email addresses, company associations and other details.

Note: This information will be visible to other account users when accessing project participants or managing account users.

Warning: If you have signature-requiring process steps in your court or if such processes have already been initiated, do not change your first or last name until these processes are no longer in progress; otherwise, you will not be able to sign the documents. If you change your name while there aren't any processes that require your signature currently in progress, you will be prompted to create a new signature upon signing; at which point, you can also enter a new name (that does not have to match your Trimble Unity Construct profile name). To learn more, see About Electronic Signatures.

To update your profile

1. Go to My Settings.
2. Click **Personal Information**, and then **My Profile**.
The My Profile page is displayed.
3. Click **Update**.
4. Update all necessary information.
5. Click **Save**.

Change my Password

There is an audit trail for everything you do in e-Builder; therefore, it is of utmost importance to maintain the security of your account access. If you feel your password has been compromised, change your password as soon as possible.

A valid password must meet the following criteria:

- Be at least 8 characters long
- Contain at least one letter
- Contain at least one number
- Contain at least one special character (non-letter/ number)
- Cannot be the same as your username, first name, last name, or company name.
- Cannot be a recently used password
- Cannot be a common password

Tip: When you are added to e-Builder, you will receive an email with your assigned username as well as a link to reset your password and set your security questions. The username will also be displayed on the Change Password page when resetting your password using the "Forgot password" link.

To change your account password

1. Go to My Settings.
2. Click **Personal Information**, and then click **Change My Password**. The Change Password page is displayed.
3. Update the following required fields (marked by an *):
 - **Current Password***: Enter the current password for your user account.
 - **New Password***: Enter the new password for your user account.
 - **Confirm***: Re-enter the new password for your user account to confirm it.
 - **Security Questions**: Modify the security questions selected for your user account and edit the answers to the questions if required.
4. Click **Save**.

About Access Delegation

Access delegation allows you to request access to another user's profile or grant someone else access to your profile. Once the request is made, an email notification is sent to the requested party. Users have the option to accept or decline this request. A link for outstanding requests is available from the My Settings area. If access is granted, users have the ability to set an expiration date and time.

It is important to note that actions completed by the delegated user will show in the audit trail as the original user's actions. At any time before access expires, users are able to switch between profiles by clicking the drop-down arrow next to their username. Should account administrators wish to disable or enable this feature, they may do so by going to the Account Settings page (Setup > Settings > Account Settings) and clearing or selecting the Allow access delegation check box. If this feature is disabled, the Access Delegation option will not appear in the Personal Information section.

This feature can be used to benefit you in the following ways:

- **Out of the Office Assistance**: While out of the office, Trimble Unity Construct users can grant colleagues access to their profiles so processes are not delayed while they are away.
- **Verify New User Permissions**: When a new user is created, the administrator can log in as that user in order to ensure they have the necessary permissions to complete their tasks. Once the user logs in however, the account administrator will have to request permission to log in as that user.
- **Troubleshooting**: Account administrators and Trimble technical support can request permission to log in as an Trimble Unity Construct user to better assist with troubleshooting and cross-checking permission settings.

Note: Admins can delegate their access only to other Admins.

To access the [Access Delegation](#) page

1. Go to My Settings.
2. Click **Personal Information**.
3. Click **Access Delegation**.

Grant Someone Access to My Profile

Note: Admins can delegate their access only to other Admins.

To grant a colleague access to your profile

1. Open the Access Delegation page.
2. Click the **Grant Access** radio button.
3. In the **Select User** section, select the user(s) you want to grant access to.

Tip

To shorten the list of users, filter for a specific role.

4. In the **Access Duration** section, enter the date and time that you want access to begin and end.
5. Optionally, enter any notes about the access delegation in the **Notes** field.
6. Click **Save**.

Request Access to Someone's Profile

Note: Admins can delegate their access only to other Admins.

To request access to a colleague's profile

1. Open the Access Delegation page.
2. Click the **Request Access** radio button.
3. In the **Select User** section, select the user(s) to request access from.

Tip

To shorten the list of users, filter for a specific role.

4. In the **Access Duration** section, enter the date and time that you are requesting access to begin and end.
5. *Optional:* Enter any notes about the request in the **Notes** field.
6. Click **Grant**.

Access Delegation Page

The Access Delegation page allows you to grant another Trimble Unity Construct user access to your profile. You can also request access to another user's profile from this page. For more information on this feature, see About Access Delegation.

Note: Admins can delegate their access only to other Admins.

To access the Access Delegation page

1. Go to My Settings.
2. Click **Personal Information**.
3. Click **Access Delegation**.

Fields and Buttons

The fields and buttons located on this page are:

Access Delegation Management Tab

This tab displays by default and allows you to view the status of pending requests, make new requests or request access to someone else's profile.

Filter Delegations

Use the delegations filter to narrow delegation results. This filter can be collapsed to increase screen real estate.

- **User:** Click the drop-down arrow to filter for access or request records by a specific user.
- **Start Date:** To filter for access or request records whose start date was within a certain time frame, enter the dates in these fields.
- **Status:** To filter for access or request records of a certain status, click this drop-down arrow to make a selection.
- **End Date:** To filter for access or request records whose end date was within a certain time frame, enter the dates in these fields.
- **Clear:** Click to clear the filter.
- **Filter:** Click to filter by entered criteria.

Delegation Table

- **Action:** Displays the action that can be taken on the request.
- **Current Status:** Displays the status of the request.
- **Access Type:** Displays whether access has been requested or granted.
- **User:** Displays the name of the user whose profile you have requested access to or the name of the user who has requested access to your profile.
- **Start Date:** Displays the date that access was requested to begin.
- **End Date:** Displays the date that access was requested to expire.
- **Notes:** Click this icon to view any notes that may have been added regarding this access request.
- **Grant Access:** Select this option to grant someone access to your profile. For instructions, see Grant Someone Access to Your Profile.
 - **Select User** - Select the user you wish to grant access to. Filter by roles to narrow down the list of users, select from the list of all users or enter the person's username in the available text field.
 - **Access Duration** - Select a date and time to start and end the person's ability to access your profile.
 - **Notes** - Enter any necessary notes for this delegation that the user will be able to see.
- **Request Access:** Select this option to request access to someone else's profile. For instructions, see Request Access to Someone's Profile.
 - **Select User** - Select the user whose profile you wish access. Filter by roles to narrow down the list of users or select from the list of all available users.
 - **Access Duration** - Select the time frame for which you need to have access to the user's profile.
 - **Notes** - Enter any necessary notes for this delegation that the user will be able to see.
- **Check Spelling:** Click to check the spelling in the notes before sending.
- **Grant:** Only displays when access is being granted. Click to grant access to your account.

- **Request:** Only displays when access is being requested. Click to request access to someone's account.
- **Clear:** Click to clear all completed fields.

Access Delegation History

This tab provides a log of all access delegation transactions.

- **Name:** Displays the name of the user that had access to your profile.
- **Time Stamp:** Displays the date and time that access was granted.

About Preferences Settings

The Preferences section allows you to specify your settings for the following areas:

- **Notification settings:** Customize your personal notification settings and create summary notification settings:
 - **Settings:** Specify general settings such as the time zone and email formats, notification settings for the calendar, documents and forms modules.
 - **Summary Notifications:** Combine all of your system notifications and receive one daily summary, thus reducing the volume of emails you receive.
- **Interface settings:** Customize your personal default display settings, font size, other display settings and more.

To access the Preferences settings

1. Go to My Settings.
2. Click **Preferences**.

Access Notification Settings Page

Notification settings allow you to configure the details for notifications that are sent from various areas of Trimble Unity Construct Enterprise.

To access personal notification settings

1. Go to My Settings.
2. Click **Preferences**.
3. Click **Notification Settings**. The Notification Settings page is displayed and the Settings tab is selected by default.

For more information, see Notification Settings and Summary Notifications.

Notifications Settings Tab

Notification settings allow you to configure the details for notifications that are sent from various areas of e-Builder Enterprise.

To edit notification settings

1. Go to My Settings.
2. Click **Preferences > Notification Settings**.
3. On the **Settings** tab, modify your notification settings as needed. For a description of each setting, see the section below.
4. Click **Save**.

The field descriptions for each section of the Settings tab on the Notification Settings page are as follows:

General

- **Time Zone:** By default, your time zone is your computer system's time zone. Stamped notifications (e.g., notification emails, process instances, uploaded documents, and scheduled tasks) will reflect the user's profile time zone. Click this drop-down menu to make changes.
- **Email Format:** HTML is the default font style for notification messages, but you can switch between this option and Text format, which will display plain text without any formatting.

Calendar

- **Receive Calendar Event Reminders:** Select to receive email reminders of calendar events.

Documents

- **Email-In Notifications:** When you email a document to a folder in the Documents module, you will receive a confirmation email on the success or failure of the email. If this setting is set to "All", a confirmation will be sent when the message has been successfully transmitted and when the message has failed. Choosing "Failed Only" will allow you to receive a notification only when the email has failed. To learn more about this feature, see Email Enable Folders.

Forms

- **Disable CC Notifications From Workflow Forms:** Select to disable notifications that would be sent to you when you are CC'd on a Workflow Form.
- **Receive Form Closed Notifications:** This option is selected by default and it allows you to receive an email notification whenever a form is closed.
- **Include Recipient List in Form Notifications:** Select to receive a list of all form recipients along with your form notifications.
- **Include Form Fields in Form Notifications:** Select to include the fields of a form within form notifications.
- **Include Only the Most Recent Comment in Form Notifications:** Select to limit the comments in a form notification to only the most recent comments.

Summary Notifications

Depending on your role and involvement in a project, you can potentially receive a large quantity of system generated notifications from e-Builder throughout the day. The summary notifications feature gives you the option to combine all of your system notifications and receive one daily summary, thus reducing the volume of emails you receive.

These notifications can be set up at the account level and managed for any number of users or roles. Likewise, individuals can set up notifications for themselves. You can choose which modules to include in each notification summary as well as the specific components of the module, such as cost approvals and opened or closed forms, for example.

To access Summary Notifications

1. Go to My Settings.
2. Click **Preferences > Notification Settings**.
3. Click on the **Summary Notifications** tab.

Create Personal Summary Notifications

You can create personal summary notifications for yourself on the Summary Notifications page. Account administrators can also create these notifications on behalf of the members of the organization.

To create personal summary notifications

1. Go to the Summary Notifications tab.
2. Click **Create**.
3. If an account admin has made templates available, the **Template** field is displayed with the option to create a summary notification based on a predefined template.
4. Enter a subject for the summary in the **Subject** field.
5. In the **Module(s)** field, choose the modules from which to summarize notifications.
A list of specific notifications for the selected module(s) appears in a table below.
Note: If an account administrator made a template available for general use, it will appear as an optional selection.
6. Click the **Send Daily Summary at** drop-down menu to choose a delivery time for your summary notification.
7. Select the check box next to the specific notifications you wish to include in the summary.
8. Click **Save**.

Edit Personal Summary Notifications

You can modify summary notification settings at any time, and this includes the ones assigned to you by an account administrator. The only exceptions are for modifying templates that administrators have restricted.

To modify personal summary notifications

1. Go to the Summary Notifications tab.
2. Click the **Edit** link beside the notification name.
The Edit Summary Notification page is displayed.
3. Update the details of the notification:
 - Modify the subject
 - Add or remove modules
Note: When modules are removed, instant notifications will be received as if the summary notification was never created.
 - Update the delivery time
 - Update the recipients
 - Update the items included in the notification by selecting or clearing the appropriate check boxes.
4. Click **Save**.

Delete / Disable Personal Summary Notifications

Some summary notifications can be removed or disabled at any time. The exception is for the ones that an account administrator has created and set a restriction on.

Note: If you wish to disable any summary notification that is restricted, please contact your account administrator.

To delete or disable personal summary notifications

1. Go to the Summary Notifications tab.
2. To enable/ disable a notification, click the **Enable** or **Disable** link associated with the notification.

Note: When this feature is disabled, instant notifications will be received as if the summary notification was never created.

3. To remove the notification, click the **Delete** link.
You are prompted for confirmation.
4. Click **OK** to confirm the changes

Interface Settings Page Overview

The Interface Settings page allows you to customize different aspects of the Trimble Unity Construct interface.

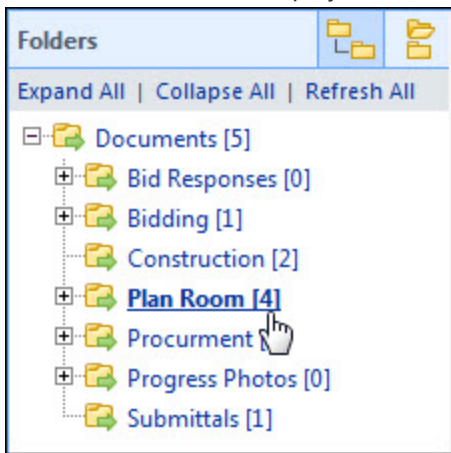
To access the interface settings

1. From the top navigation tabs, click the **Setup** tab or from the Utility menu by clicking the drop-down arrow next to your user name.
2. From **My Settings**, click **Preferences > Interface Settings**.
The Interface Settings page is displayed.
3. To edit the interface settings, click **Update**.
4. Modify the settings as necessary.
5. Click **Save**. The changes are retained.

A description of the fields and buttons located on the Interface Settings page is as follows:

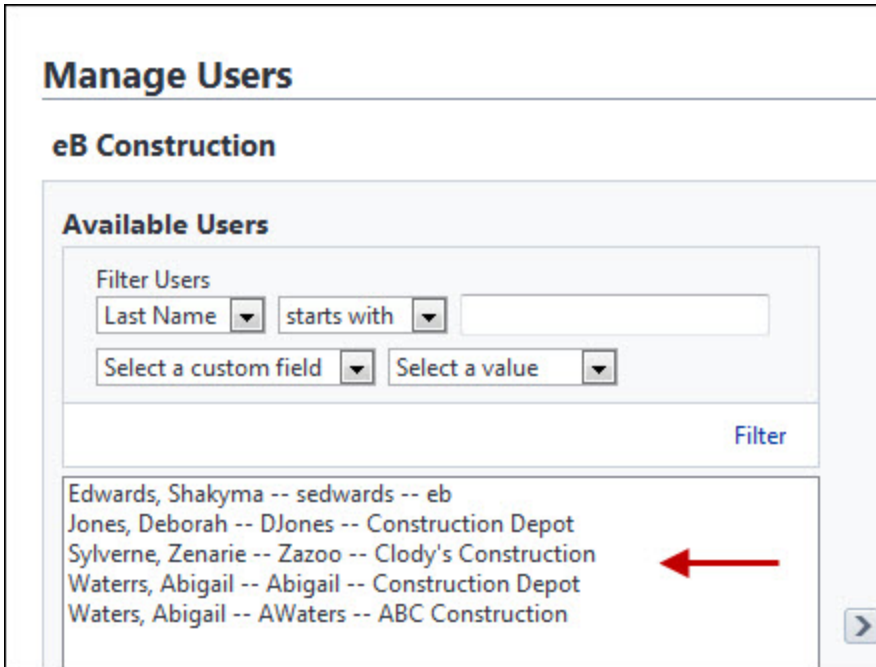
- **Font Size:** Select a preferred font size. This setting affects body text only, not buttons or the options in the Project Menu. The default selection is Small (12px). The text on the page dynamically adjusts as you switch between these options so you can preview each font option before committing to the change.
- **Display Density:** Select an option to determine the amount of white space that appears between each row of information. You can choose to have a **Compact**, **Comfortable** or **Relaxed** display density. The default selection is **Relaxed**. The display density dynamically adjusts as you switch between these options so you can preview each one before committing to the change.
- **Default Tab:** Click this drop-down arrow to select the module that displays by default after you login to e-Builder Enterprise. You can set your preferred module or one that you often access first as the default tab. The Home tab is the default selection in this field and it allows you to view all items in your court easily.

- **Default Project:** If you have a default tab selected in the setting above, then choosing a default project here will automatically open your default module to the project you select in this setting, with the exception of the Home tab.
- **Default Documents Sort Order:** Click this drop-down arrow to select the default order in which documents are listed in the system. You can choose to sort documents by File Name, Date Created, Owner or Company. You can further customize sort order in ascending or descending order.
- **Default Files Per Page:** Click this drop-down arrow to select a default number of files to display per page.
- **Expand All Folders By Default:** Select this check box to have folders automatically expanded when a page loads.
- **Include Subfolder Files In Folder File Count:** Select this check box to include files in subfolders in the total file count that displays in the Documents Folders Pane.

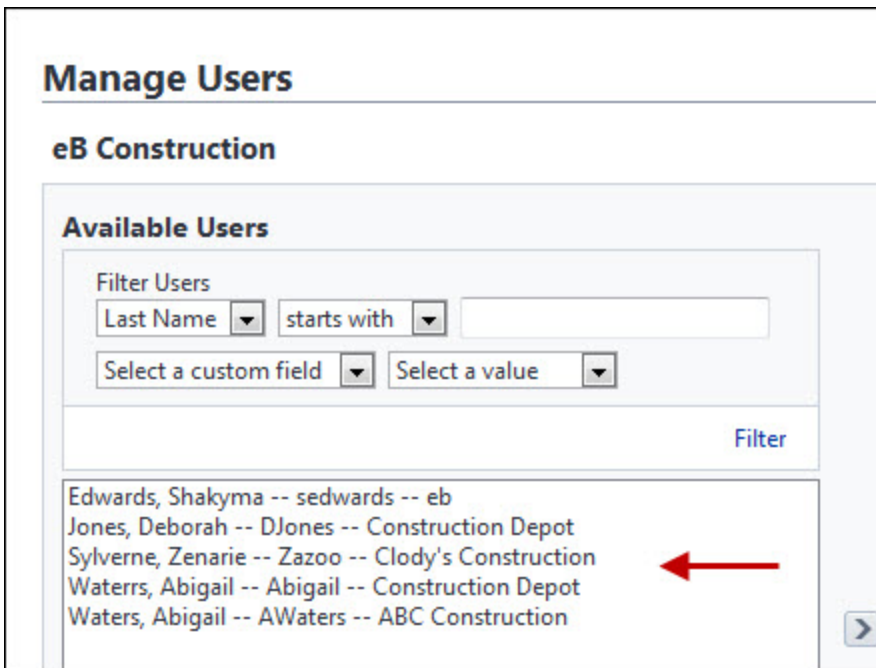


- **Default Forms Sort Order:** Click this drop-down arrow to select the default order in which forms are listed in the system. You can choose to sort forms by Subject, Prefix, Number, Author, Held By, Due Date or Status. You can further customize sort order in ascending or descending order.
- **Default Forms Per Page:** Click this drop-down arrow to select a default number of items that will display per page.
- **Default Participant Sort Order:** Click this drop-down arrow to select the default order in which participants are listed in the system by. You can choose to sort participants by Last Name, User Name, Company Name or Date Added. You can further customize sort order in ascending or descending order.
- **Default Project Manage Users Sort Field:** Click this drop-down arrow to select the default order in which users are listed on the Manage Users page when adding members to a project. You can choose to sort participants by Last Name, User Name, Company Name or Date Added. You can further cus-

tomize sort order in ascending or descending order.



- **Show Me In The Trimble Unity Construct Global User List When Adding Members To Projects:**
Select an option to specify whether your user name is included or excluded in the global user list.



- **Yes** - Select to include yourself in the list of users that administrators will see when adding existing users to an account.

- **No** - This is the default selection. Select to omit your name from the list of users that appear when adding members to an account.
- **Automatic Spell Check:** Select to enable automatic spell checking. You will not be required to click the Spell Check button. This setting will be active wherever text entries are accepted.
- **Automatically Filter Contacts For Project Lookup:** Select this check box if you want only project contacts to be included in the search results when looking up contacts in Trimble Unity Construct. Whenever you are searching for contacts, the Contact Lookup window displays. If the Project Contacts Only setting is enabled, the search results will display only contacts associated with the project you're in, as opposed to contacts saved across the entire account. Selecting this check box will insure that the Project Contacts Only check box is automatically selected when looking up contacts.

Lookup (Select users/contacts to add below)

Filter Users/Contacts Users Only

<p>First Name: <input type="text"/></p> <p>Username: <input type="text"/></p> <p>Project Contacts Only: <input checked="" type="checkbox"/> ←</p> <p>User Custom Fields: <input type="text" value="Select a user custom field"/></p> <p>Contact Custom Fields: <input type="text" value="Select a contact custom field"/></p>	<p>Last Name: <input type="text"/></p> <p>Company: <input type="text"/></p>
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- **Hide Calendar on Home Tab:** Select to hide the calendar on the Home tab. This tab is visible by default, but can be hidden to allow the page to load more quickly or to increase screen real estate.

Schedule Templates

Schedule templates are a great time-saving tool. They provide a prototype for project schedules. If you have projects that are similar in nature such as elementary schools, high schools, and parking garages, each of these project types can have a template that will ensure, at the minimum, the core tasks are addressed. Templates also give the schedule manager a framework for building and completing the project schedule. With very little verbal communication, you and the schedule managers can be in sync with task schedule management.

Note: Only users with Manage Templates permissions are able to save the template as an account setting.

Account templates are available in all projects, whether or not the schedule manager has access to those projects.

Personal templates can be created by you, or for you by an administrator or user with Manage Template permissions. These templates can be created from My Settings or directly from the Project Schedule. A schedule that includes the fundamental milestones and master tasks might be saved as an account template. Personal templates are tied to your username and will be available in any project that you have access to.

Constraints are not saved to templates. Non-managers may choose to add templates to track only the tasks that pertain to them. For example, someone in the Finance department might only be concerned with master tasks and would therefore make the duration of all subtasks "0" and apply this template to all of their new projects.

To access the Admin Schedule Template page

1. Click **Setup**.
2. From the Administration Tools menu, expand **Schedule**.
3. Click **Schedule Templates**.

The Schedule Templates page is displayed.

To access My Schedule Templates page

1. Click **Setup**.
2. From the My Settings menu, expand **Schedule**.
3. Click **My Schedule Templates**.

The My Schedule Templates page is displayed.

Add a schedule template

Administrators or users with manage schedule permission can add schedule templates

Tip: Ensure that you complete the required fields that are marked with an *.

To add a new schedule template

1. On the tasks toolbar, click **Add**.
2. Enter schedule template details:
 - **Name***: Enter a name for the schedule template. This field is required.
 - **Description**: Enter a brief description of the schedule template.
 - **Status**: To make this template available for use, select the **Active** option (this is the default selection). To leave it as a draft template, select the **Draft** option.
 - **Link Resource Cost to the Budget**: This option is only available if you have the Resource Management with Cost module enabled.
 - **None**: Default setting - This setting is disabled.
 - **Tasks to Budget Line Item**: Allows Schedule Manager to select a single Budget Line Item for Resource Costs on a Task. Choose this option for projects where all the resources who are assigned to a single task charge their time to the same budget line item or account code.
 - **Resources to Budget Line Item**: Allows the schedule manager to select a single budget line item per resource assigned to any task. Can result in multiple budget line items for resource costs on a task if resources are linked to different budget line items. Choose this option for projects where different resources working on the same task can charge time to different budget line items or account codes.
 - **Duration**: The duration of the schedule. This field is not editable.
 - **Created By**: The name of the user who created the schedule template. This field is not editable.
 - **Date Created**: The date when the schedule template was created. This field is not editable.
3. Click **Save**.

Delete a schedule template

Warning: Once a schedule template is deleted, it cannot be recovered. Deleted templates are immediately removed from the account and will no longer be available for use.

Tip

If you do not want this template to be available for use, but you also don't want to remove it from the account, change its status to "draft."

To delete a schedule

1. On the Schedule Templates page, click the **Delete** link located to the left of the template you want to delete. A confirm deletion message is displayed.
2. Click **Yes, Delete the Schedule Template** to delete the template.

- Related topics

Working with Schedule Templates

Tasks can be added to schedule templates through an import of a Microsoft Project .mpp file or manually, by adding one task at a time. In most cases, an import will be used, but manual entry might be necessary for adding additional tasks after the initial schedule has been uploaded. You can work on your personal schedule templates or on an account schedule template (Admin) that will be available to all projects.

To access the Admin Schedule Template page

1. Click **Setup**.
2. From the Administration Tools menu, expand **Schedule**.
3. Click **Schedule Templates**.

The Schedule Templates page is displayed.

To access My Schedule Templates page

1. Click **Setup**.
2. From the My Settings menu, expand **Schedule**.
3. Click **My Schedule Templates**.

The My Schedule Templates page is displayed.

To access the Schedule Template Details page

- On the Schedule Templates page, click **Edit** to the left of the template you wish to work with. The **Schedule Template Details** is displayed.

Tasks toolbar

On the Schedule Template Details page, the following operations can be performed using the Tasks toolbar:

- **Add Task:** This button is not visible to Task Resources. Only Schedule Managers and Task Managers are able to see this button. Click to add a single task.
- **Outdent:** Decreases the indentation level of the selected task in the tree. This button is only available to Schedule Managers or users with Manage Templates permission. For instructions, see Move Tasks within the Schedule.
- **Indent:** Increases the indentation level of the selected task in the tree. This button is only available to Schedule Managers or users with Manage Templates permission.
- **Undo:** Click to undo the last action. This button is only available to Schedule Managers or users with Manage Templates permission.
- **Redo:** Click to redo the last action. This button is only available to Schedule Managers or users with Manage Templates permission.
- **Import:** Click to import tasks using an .MPP file (Microsoft Project 2003, 2007, 2010, 2013). This button is only available to Schedule Managers or users with Manage Templates permission. For details or instructions, see Working with Schedule Imports.

- **Expand:** Shows all the tasks and subtasks.
- **Collapse:** Collapses the subtasks under their tasks.
- **Previous / Next:** Moves the time axis backward / forward in time in units specified by the current view.
- **Zoom In/Out/Fit:** Click to zoom in or out the timeline. Click Fit to change the timeframe of the scheduling chart to fit all the events in it.
- **Working Time:** Click to open the Manage Calendars dialog box. If your account has the Resource Management (RM) or Resource Management with Costs (RMC) option enabled, you have the ability to manage calendars.

Edit the details of a schedule template

1. On the Schedule Templates page, click the **Edit** link located to the left of the template you want to edit.
2. In the Schedule Template Details area, edit the following details as required:
 - **Name:** The name for the schedule template.
 - **Description:** The description of the schedule template.
 - **Status:** The status of the schedule template.
 - **Link Resource Cost to the Budget:**
 - **None:** Default setting - This setting is disabled.
 - **Tasks to Budget Line Item:** Allows Schedule Manager to select a single Budget Line Item for Resource Costs on a Task. Choose this option for projects where all the resources who are assigned to a single task charge their time to the same budget line item or account code.
 - **Resources to Budget Line Item:** Allows the schedule manager to select a single budget line item per resource assigned to any task. Can result in multiple budget line items for resource costs on a task if resources are linked to different budget line items. Choose this option for projects where different resources working on the same task can charge time to different budget line items or account codes.
 - **Duration:** The duration of the schedule. This field is not editable.
 - **Created By:** The name of the user who created the schedule template. This field is not editable.
 - **Date Created:** The date when the schedule template was created. This field is not editable.
3. Click **Save**.

Add tasks manually to a schedule template

You can add tasks to the template one task at a time.

[To add tasks manually](#)

1. On the tasks toolbar, click **Add Task**.

A new row is added to the bottom of the schedule template.

2. Add the task's details inline and complete all required fields from the following:

- **Task Name:** Enter the name of the task in this field.
- **Choose where to add the task:** Choose the order in which you want this task to occur:
 - Add as a last task in the schedule.
 - Add as a subtask of [choose predecessor task].
 - Insert above [choose task that will follow this one].
 - Insert below [choose task that will precede this one].
- **Task Type:** Select whether this is a task or event.
- **Duration:** Enter the amount of days, weeks, or months this task will take to complete.
- **Master Task:** Select the Master Task.
- **Description:** Enter a description to give the Schedule Manager more information about the task.
- **Predecessors:** Enter the task number of the predecessor task. The predecessor task is a task that must be completed before another task can begin. For information, see About Predecessor Tasks. The proper syntax for this field is the task number + start/ finish abbreviation.
- **Resource Role:** Select the name of the person that will be responsible for overseeing this task.
- **Manager Role:** Select the name of the schedule manager.
- **Approval Required for Date Changes:** Select this check box to require approval on changes made to the dates associated with this task.
- **Approval Required for Work Complete Changes:** Select this check box to require approval on changes made to work that has already been marked completed. The options that you can include and a description of each are listed below:
 - **No:** A manager's approval is not required when changes are made to the completion status of this task.
 - **All Changes:** A manager's approval is required when any change is made to the task's completion status.
 - **100% Only:** A manager's approval is only required when the task is set to 100% complete.
- **Set Task as a Milestone?:** Select this check box to set this task as a milestone in your schedule. Identifying milestones increase the value of Schedule reports.

3. Click **Save**.

Add tasks using an import file

The standard schedule template import files are .mpp files, which can be exported from Microsoft Project. Typically, import files will include the task name, duration, predecessors, and the start and finish dates; but for your convenience, e-Builder specific fields, can also be included. If the import file includes any of these

columns by different names, you'll be able to map those columns to the corresponding e-Builder fields during the import process.

Note: Adding tasks to the schedule template is the second and final step to create schedule templates. If you have not already done so, please add a schedule template before attempting to complete this process.

To import tasks

1. On the tasks toolbar, click **Import**. The Import Schedule page is displayed with a 3-step import wizard.
2. In the Import File field, click **Choose File** to browse for and select the import file.
3. Click **Next**. The Field Mapping page is displayed showing the mapping between the columns in the import file and the e-Builder fields.
4. If necessary, map the columns in the import file to the corresponding built-in e-Builder fields.
5. Click **Next**. The Review page is displayed showing a preview of the import and any exceptions determined.



Tip: A count of the rows that imported successfully display on the **Preview** tab. The **Exceptions** tab lists the rows that failed to import and the reasons why. Click this tab to view failed items. To go back and make corrections to the import file, click **Previous** and on the Mappings page, click **Previous** again, and then repeat the steps.

6. Click **Import** to complete the import.
7. Click **Save**.

Move tasks within the schedule template

Once the tasks have been created, you can move them within the schedule template to rearrange them or create sub-tasks.

To move tasks within the schedule template

1. Select the task you wish to move.
2. Do any of the following actions:
 - Drag it up or down within the schedule to reposition it.
 - To make it a subtask, move it directly below the parent task, and then click the  **Indent** in the **Tasks** section of the toolbar.
 - To move a subtask out of a parent task or to make it a summary task, click the  **Outdent** in the **Tasks** section of the toolbar.

Manage Calendars

Use the Manage Calendars dialog box to edit or create a new calendar. You can also set the working days and hours, as well as set the exceptions (e.g., holidays).

To add new calendars

1. On the tasks toolbar, click **Working Time**. The Manage Calendars popup window displays with the standard calendar.
2. Click **Add**. The Add New Calendar popup is displayed.
3. In the **Name*** field, enter a name for the new calendar.
4. Choose one of the following options:
 - **Make a copy of the (calendar)**: Select this option and select a calendar from the drop-down list to make a copy of an existing calendar.
 - **Add a new calendar**: Select this option to add a new calendar.
5. Click **Add**. The new calendar is added.

Note: To make it the default calendar, select the **Default Calendar** check box.

To edit the working time

- a. Select the calendar to edit it. Click **Edit Working Time**. The Edit Working Time popup window displays.
- b. From the **Working Week** field, select the working days for the calendar.
- c. In the **Working Hours** field, click on the working hours to edit them or click **Add** to add new hours.
- d. Click **OK**.
- e. Click **Apply** to save your changes.

To add exceptions to your calendar, such as working or non-working days

- a. Select the calendar to edit it. In the **Exceptions** section, click **Add**. A new row is added.
- b. In the **Name** column, enter a descriptive name for the exception.

Note: Two exceptions cannot be added for the same day.

- c. In the **Type** column, select whether it is a working or non-working type of exception.
- d. In the **Start Date** field, enter or select the start date of the exception.
- e. In the **Finish Date** field, enter or select the finish date of the exception.
- f. Click **Apply** to save your changes.

Copy schedule templates

1. Apply the template to a blank project.
2. Go to the blank project and create a new template based on the existing project.
3. Edit the newly created template.

About Subscriptions

The Subscriptions section allows you to manage document and report subscriptions. Document subscriptions are created in the Documents module and can be modified from this section. Document subscriptions can either be created by you or for you, by an administrator who assigns the subscription to you. Report subscriptions can be added and managed from here as well.

The following topics will help you work with document and report subscriptions.

Document Subscriptions

- Document Subscriptions
- Add and Edit Document or Folder Subscriptions

Report Subscriptions

- Report Subscriptions

Document Subscriptions

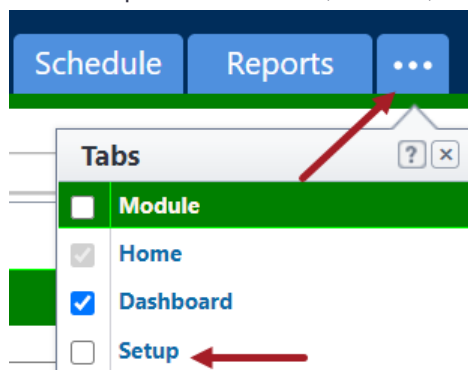
Document subscriptions are added in the Documents module, but can be managed from the Document Subscriptions page at any time. Subscription management allows you to delete subscriptions or change the subscription types from daily summaries or instant notifications.

Document subscriptions created for you by an administrator cannot be changed or deleted. The document subscriptions that you create for yourself can be modified at any time.

To edit document subscriptions

1. From the top navigation tabs, click the **Setup** tab.

If the Setup tab is not visible, click , and then select the **Setup** check box.



The My Settings section is displayed on the left pane.

2. Click **Subscriptions** to expand it.
3. Click **Documents**.
4. If you have access to multiple projects, select the project the subscription belongs to from the **Select Project** drop-down menu.
5. To delete a subscription, click the **Delete** link next to the subscription.

—Or—

To change the subscription type, choose one of the following:

- **Instant notification** will send you an email whenever a new file is uploaded to the folder, a new version of a file is created, a file is deleted, or if a file is redlined.
- **Daily summary** will send you a recap of everything that has happened during the previous day.

6. Click **Save**.

Fields and buttons available on the Document Subscriptions page

- **Select Project:** Click and select a project from this drop-down list to manage the subscriptions for it.
- **Email format:** Select a format for the subscription email from this drop-down list. By default, subscriptions are sent in HTML format but you can choose to receive the email notifications in text format, which will remove style formatting.
- **Folder Name:** Click the folder path to be redirected to this folder in the Documents module.
- **Subscriber:** Displays the email address to which notifications are sent. To change this email address, update it in your profile. See Update My Profile for instructions.
- **Instant:** Indicates an instant notification subscription type. Instant notification will send you an email whenever a new file is uploaded to the folder, a new version of a file is created, a file is deleted, or if a file is redlined.
- **Daily:** Indicates a daily summary subscription type. A daily summary will send you a recap of everything that has happened during the previous day.
- **Save:** Click to save changes. This button is located toward the bottom of the page, you may have to scroll down to see it if you have several subscriptions established.
- **Delete:** Click to delete the subscription.

Related Topics

- [About Subscriptions](#)
- [Add Document Subscriptions](#)

Report Subscriptions

Report subscriptions can be managed from this page at any time. Subscription management allows you to add, delete or change scheduling details.

Note: Sometimes subscription reports would fail to execute due to configuration problems such as changed report permissions, invalid destination folders or due to invalid users. The report would continue to retry on each subscription period indefinitely and continue to fail consistently. To avoid this, e-Builder sets a limit on the number of retries made. Report subscriptions will retry immediately five times, and then for four more

scheduled periods. If the report continues to fail, it will be marked disabled after the fifth scheduled attempt. An email notification will be sent to the subscribed user and administrators informing them that the subscription has been disabled.

Dates and Times

Note: Dates and times shown in scheduled reports are converted to the time zone of the user who created the scheduled report. This can make dates look incorrect if the scheduled report's time zone is different from the receiving user's time zone.

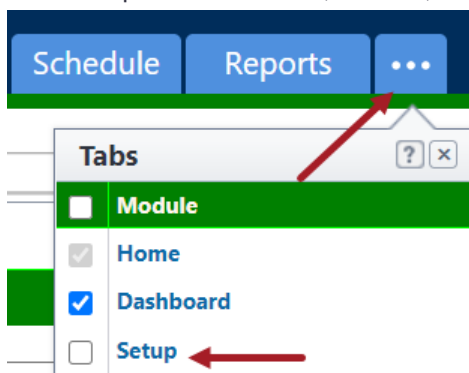
Access Report Subscriptions

Use the Subscriptions - Reports page to view all the scheduled reports you are subscribed to.

To access subscription reports

1. From the top navigation tabs, click the **Setup** tab.

If the Setup tab is not visible, click , and then select the **Setup** check box.



The My Settings section is displayed on the left pane.

2. Click **Subscriptions** to expand it and then click **Reports**.
The Subscriptions - Reports page is displayed.

Fields and buttons available on the Subscriptions - Reports page

- **Add Scheduled Report:** Click to add a scheduled report, which will allow you to receive existing reports on a scheduled basis. These subscriptions can be added by any licensed e-Builder user at any time.
- **Edit:** Click to modify the details of the subscription, such as the report type, subscription name, delivery method and frequency.
- **Delete:** Click to delete the report subscription. This will remove the subscription for the account all together.
- **Disable:** Click to disable the report subscription. Disabling allows you to temporarily suspend the subscription without removing it from the account all together.
- **Run Now:** Click to run the report and receive real time data.
- **Name:** Displays the name of the name of the subscription. Click the name to directly view the report in e-Builder.

- **Output Type:** Displays the output type. To make changes, go to step 1 of 4 of the Edit Scheduled Report wizard.

Options include:

- **HTML:** This output type formats data in HTML - the standard formatting language used to create websites
- **Excel Data Export:** This output type allows you to view and modify data in an Excel spreadsheet.
- **Excel Print View:** This output type is a read-only Excel spreadsheet that cannot be modified.
- **CSV Data Export:** This output type displays data in a table-structured, comma separated format.
- **Tab Delimited Text:** This output type separates data using the tab character. This format supports exchanging and storing information in databases.
- **Schedule:** Displays the days and time the report is scheduled to run.
- **Next Run Time:** Displays the next time day and time the report is scheduled to run.
- **Last Run Time:** Displays the last date and time the report is scheduled to run.
- **Last Result Status:** Displays the status of the last report. Scheduled reports can either succeed or fail.
- **Delivery Type:** Displays the delivery method set for this scheduled report. To make changes, go to step 4 of 4 of the Edit Scheduled Report wizard.

More than one of following options may be selected:

- **Email** - Select to receive your email subscriptions via email. Additional options allow you to:
 - Opt out of receiving empty reports
 - Choose others to copy on the subscription
 - Add email addresses of people you wish to unsubscribe. If someone unsubscribes that you subscribed, their name will be listed in the Unsubscribed Addresses box.
- **e-Builder Document Folder** - Select to have your subscription sent to an e-Builder Documents folder. Additional options allow you to:
 - Choose a destination folder
 - Receive an email confirmation so you're alerted when the report is delivered
 - Opt out of receiving empty reports
- **FTP** - Select to have subscriptions sent over an FTP (File Transfer Protocol) server. Additional options allow you to:
 - Enter the server address, port, user name password and directory
 - Use SSL
 - Receive an email confirmation so you're alerted when the report is delivered
 - Opt out of receiving empty reports
- **Secure File Transfer (SSH)** - Select to have your subscription sent via SSH. Additional options allow you to:

- Enter the server address, port, user name password and directory
- Receive an email confirmation so you're alerted when the report is delivered
- Opt out of receiving empty reports

Add a Report Subscription

Personal report subscriptions allow you to receive existing reports on a scheduled basis. These subscriptions can be added by any licensed e-Builder user at any time.

When adding scheduled reports, you will work through a four-step configuration wizard that allows you to set up the details of your subscription.

To add a scheduled report subscription

1. Go to My Settings.
2. Click **Subscriptions**, and then **Reports**.
The Subscriptions - Reports page is displayed.
3. Click **Add Scheduled Reports**.
The Add Schedule Report page of the Schedule Report Wizard (Step 1 of 4) is displayed.
4. Complete all the required fields on each step of the Schedule Report Wizard.
Refer to the list of fields and buttons below for more information on each step of the Schedule Report Wizard.
5. Click **Next** to advance to the next step of the wizard.
6. Click **Save**.

Fields and buttons available on the Schedule Report Wizard pages

Required fields are marked with an *.

Step 1 of 4

- **Select a report to schedule***: Click the drop-down arrow to select an existing report to create the subscription for.
- **Select field to record the date for the following events**: The drop-down menu options are populated with either date-type custom fields or process/ form data fields depending upon the type of report selected to be scheduled. They allow you to include a start and completed time stamp for the scheduled report. / When the scheduled report starts processing, the first field is updated with the current system time stamp on every entity that is included in the report results. The second field gets populated with the current time stamp after the report is successfully delivered to its configured destination (email/ folder/ FTP).
- **Select an output type**: HTML is the default file output type, but you can choose from any of the following options:
 - **HTML**: This output type formats data in HTML - the standard formatting language used to create websites
 - **Excel Data Export**: This output type allows you to modified data in an Excel spreadsheet.

- **Excel Print View:** This output type is an Excel spreadsheet that cannot be modified.
- **CSV Data Export:** This output type displays data in a table-structured, comma separated format.
- **Tab Delimited Text:** This output type separates data using the tab character. This format supports exchanging and storing information in databases.

Step 2 of 4

- **Select a name for this schedule*:** By default the report name appears in this field, but you can choose to rename the subscription to something more meaningful.
- **Run report:** Select the interval for which to run and send this report. Choose from the following options:
 - Daily
 - Weekly
 - Monthly
 - One Time

Step 3 of 4

Note: The options that are available on this page are determined by the interval you selected to receive your subscription in the previous step. For example, if you choose a one-time subscription, only the option to select a date and time will appear, without the option to choose days of the week.

- **Select the date and time you want to receive this report*:** The present day is defaulted in this field. Click the calendar icon to choose a different day to receive the first subscription. Also, if you have a time preference, make the selection here.
- **Email this report each:** Select the days of the week you wish to receive the report.

Step 4 of 4

Select a delivery type: Select one or more delivery types for your scheduled report subscription. Choose from the following:

- **Email:** Select to receive your email subscriptions via email. Additional options allow you to:
 - Opt out of receiving empty reports
 - Choose others to copy on the subscription
 - Add email addresses of people you wish to unsubscribe. Add email addresses of people you wish to unsubscribe. If someone unsubscribes that you subscribed, their name will be listed in the Unsubscribed Addresses box.
- **e-Builder Document Folder:** Select to have your subscription sent to an e-Builder Documents folder. Additional options allow you to:
 - Choose a destination folder
 - Receive an email confirmation so you're alerted when the report is delivered
 - Opt out of receiving empty reports

- **FTP**: Select to have subscriptions sent over an FTP (File Transfer Protocol) server. Additional options allow you to:
 - Enter the server address, port, user name password and directory
 - Use SSL
 - Receive an email confirmation so you're alerted when the report is delivered
 - Opt out of receiving empty reports
- **Secure File Transfer (SSH)**: Select to have your subscription sent via SSH. Additional options allow you to:
 - Enter the server address, port, user name password and directory
 - Receive an email confirmation so you're alerted when the report is delivered
 - Opt out of receiving empty reports

Edit Report Subscriptions

Report subscriptions can be modified to change various details, such as the report you're subscribed to, the format of your notices, the frequency at which you're notified and many other details.

When editing scheduled reports, you will work through a four-step configuration wizard that allows you to set up the details of your subscription.

To edit report subscriptions

1. Go to My Settings.
2. Click **Subscriptions**, and then **Reports**.
The Subscriptions - Reports page is displayed.
3. Click the **Edit** link next to the subscription you want to edit.
The Edit Schedule Report page (Step 1 of 4) is displayed.
4. This page allows you to change the report and output type. To change additional details, click **Next**. Step 2 of 4 is displayed.
5. This page allows you to change the standard name of the output file, the name of the schedule and the frequency at which to run the report. To change additional details, click **Next**. Step 3 of 4 is displayed.
6. This page allows you to change the days of the week, and time you'd like to receive this report. To change additional details, click **Next**. Step 4 of 4 is displayed.
7. This page allows you to change the delivery method and copied users that will receive this report.
8. Click **Save**.

Related Topics

- About Subscriptions

About Views

Views allow you to filter the information that is displayed on the main tab of each module. These views can be created by an administrator for all members on the account or for specific roles. You can also create your own custom views that will be accessible only to you.

Custom views are beneficial because they allow you to see only the information you deem pertinent and as many views as necessary can be created. This feature can be used to organize your work so you can focus on the items that require your attention.

Key Concepts of Views

The views in e-Builder allow you to filter the information on the main page of each module in e-Builder to display only the information that is relevant to your work.

Before you start using e-Builder you should familiarize yourself with some key concepts since you have the capability of building your own customized view(s) in each of these modules.

The following concepts are used within e-Builder:

- **Project:** To begin the bid process you must first create a project. Each real world project that your organization is participating in must be associated with a project in e-Builder. Your Project Administrator or Manager will be able to add you as a member of a project in e-Builder if you are working on it.
- **Contact:** A Trimble Unity Construct contact is a record of contact information (such as phone number, fax, email address, street address, etc.) associated with a Trimble Unity Construct Company. Contacts can be stored solely as a reference or associated with Bids in the bidding module.
- **Company:** A Trimble Unity Construct company is a record of contact information (such as phone number, fax, email address, street address, etc.) for a company. There can be more than one contact associated with a company but only one company can be associated with a contact. Companies can be stored solely as a reference or associated with bids, commitments or costs in the Cost and Bidding modules.
- **Calendar:** Every Trimble Unity Construct project has a project calendar. This calendar contains the project work week, work times, and any non-working calendar days. These dates manage each projects due date calculation on forms, can be tied to cash flow forecasting, and are maintained by your Project Administrator.
- **Documents:** Each project has a document repository where you can store all of your important project files. Trimble Unity Construct allows you to control who can submit, edit, delete, or even view the documents in each folder.
- **Forms:** Within Trimble Unity Construct you can create and route electronic forms. The forms are created according to your business process and automatically route to various team members or roles on your projects. Unlike paper forms, these forms allow you to check on the status of a particular issue simply by clicking on the form in the home or forms modules.
- **Bidding:** The eTrimble Unity Construct bidding module helps manage the process that owners, general contractors, and other industry participants go through to purchase goods and services

associated with the development and construction of capital projects. It streamlines the exchange of documents, drawings and communications that surround the bid process.

Using Views in Trimble Unity Construct

Trimble Unity Construct supports the different team members that are involved in every project. All project members will be able to utilize views that their Trimble Unity Construct administrator has created for them, and any that they have created for themselves.

When you first access Trimble Unity Construct, by default you will be able to access a certain set of account level views that have been predetermined to fit for you based on your role on the project or projects. If you recognize a view that you created yourself that you believe to be valuable for other team members, let your Trimble Unity Construct Administrator know and it can be built to be shared with them too.

Example

You might be responsible for approving design documents for a set of construction projects located in the west region of your company's territory and only those managed by a specific project manager. You could create a view in the Documents module that shows you all the data you need, for only the documents that meet these criteria (from projects located in the west region). This would ensure that when you access this module you see only those projects and files that are pertinent to this function of your job. This view might also be valuable for other team members working in the west region. The remaining information, while not displayed, can be still be accessed at any time by going into the module.


Access Views

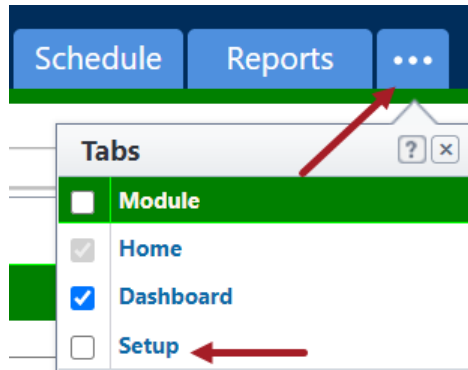
You can access views from either the Manage Views page or from the main page of each module.

The Manage Views page allows you to modify or delete the personal views you've created. Every licensed Trimble Unity Construct user is able to create personal views for the modules that they have access to. Views allow you to customize the data that is currently in view when you access a module from the top navigation tabs. Multiple views can be created for one or more of your projects combined.

Note: An account view that was created by your Trimble Unity Construct Administrator cannot be edited. You can, however, make a copy of the view and make changes to the copy. Account views cannot be deleted since they are created by an administrator and made available to all account users. However, you can hide account views using the Manage Views page so that they do not show in your list of views.

To access the Manage Views page

1. From the top navigation tabs, click the **Setup** tab.
If the Setup tab is not visible, click , and then select the **Setup** check box.



The My Settings section is displayed on the left pane.

2. Click **Views** to expand it.
3. Click the module name. The Manage Views page is displayed listing all the views available for the selected module.

Available on the Manage Views page

Buttons and Fields

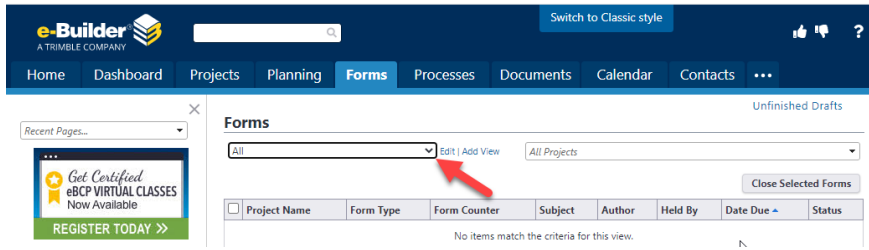
- **Edit:** Click to modify the details of the view (for personal views). Account level views cannot be edited, you can only create an editable copy of it.
- **Copy:** Click to copy the view. Creating a new view from a previous one is a quick and easy way to save a new view without having to start from scratch.
- **Delete:** Click to delete the view. For account views, if you click **Delete**, you will be asked to confirm whether you wish to hide the view from your list of views.

Note: Only personal views can be deleted. Account views can only be hidden as they cannot be deleted.

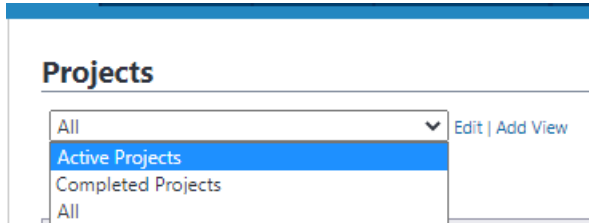
- **View Name:** Displays the name of the view.
- **Type:** Indicates whether it is a personal or an account view. Personal views are the ones that you've created while account views are created by an account administrator who has made the view accessible account-wide.
- **Status:** Indicates whether the view is currently active or hidden. Active views are accessible from their respective modules. Hidden views cannot be seen from the user interface.

To access views for a module from the top navigation menu

1. From the top navigation tabs, click the tab for the module you wish to access.
The main page of the module is displayed. The views for the module are in the drop down box at the top of the main page of each module.



2. To switch from the view that is currently displayed, click the drop down box under the name of the module and select the view you want to display.



After you select a different view, the data shown will reflect the filters associated with that view.

Tip: If you've created or have access to a view that you believe will be valuable for other team members, let your e-Builder Administrator know, so that they can duplicate it and make it available to others.

Hide Account Views

Use the Manage Views page to hide an account level view created by your administrator for your account.

To hide an account view from the Manage Views page

1. Go to the **Manage Views** page.
2. To hide a view, select **Hidden** from the **Status** drop-down list beside it.
3. Click **Save Changes**.

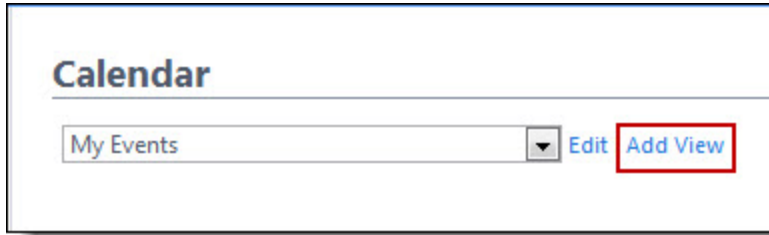
Create a View

In e-Builder, every user has the ability to create custom views for the different modules they have access to. Views allow you to see specific information for one or more projects at a time, or multiple projects. You can create a number of custom views to suit your needs.

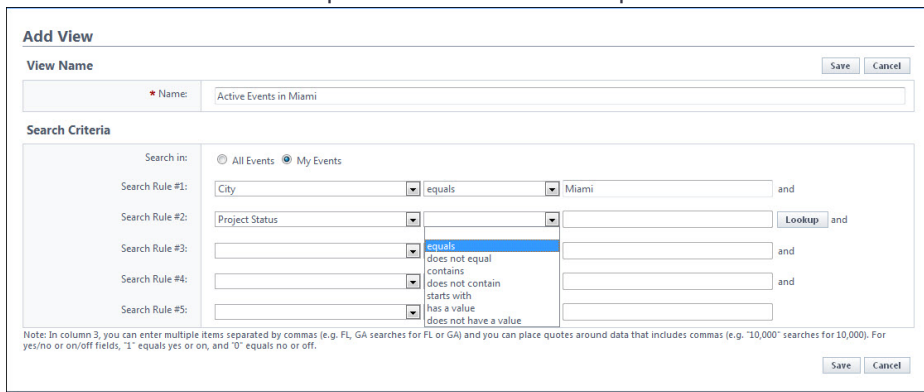
To create a custom view for a module

1. Click the desired module name from the top navigation tabs.
2. Click **Add View**.

The Add View page is displayed.



3. Enter the name of the view in the **Name** field.
4. Use the **Search Criteria** section, to specify the criteria for this view.
 - Note:** Options in the Search Criteria section will differ for each module.
5. Click the **Search Rule #1** drop-down arrow and select an event or project detail by which to choose the first criteria of this custom view.
6. Click the second column drop-down arrow to select a qualifier.



7. In the third column, enter the qualifying value. If available, you can also click the **Lookup** button to select from a list of options.

Tip: For search criteria that include duration, enter any integer immediately followed by a lower-case "d" (no space). After saving, the system will convert:

- Days "d" to weeks "w" when the number of days equals or exceeds 21d and is less than 181d.
- Days "d" to months "mo" if the number of days exceeds 182d and is less than 361d.
- Weeks "w" to months "mo" if the number of weeks exceeds 26w.
- Days "d" to years "y" if the number of days exceeds 360d
- Weeks "w" to years "y" if the number of weeks exceeds 51w
- Months "mo" to years "y" if the number of months exceeds 12mo

8. (Not available for the Calendar views) On the **Columns Displayed (numbered left to right)** section, select the columns from the drop-down list. These will be grouped from left to right.

9. (Not available for the Calendar views) On the **Sort View** section, choose to either sort the selected column in an **Ascending** or **Descending** order.
10. Click **Save**.

Create an Editable Copy of an Account View

When you access e-Builder, by default you will be able to see the account level views that have been created for you based on your role on the project or projects. If you wish to modify an account level view for your personal use, you can create an editable copy of it. You can also hide this view so that it is not displayed in your list of views.

Note: A view that was created by your e-Builder Administrator cannot be edited. You can, however, make a copy of the view and make changes to the copy.

To create an editable copy of an existing account view

1. Click the name of the desired module in the top navigation tabs.
2. Select an account view from the views drop-down list and click the **Edit** link beside it.

Forms



The screenshot shows a header 'Forms' followed by a horizontal line. Below the line is a dropdown menu with 'All' selected and a downward arrow. To the right of the dropdown is a link that says 'Edit | Add View'. A red arrow points from the right towards the 'Edit' part of the link.

3. A message will be displayed informing you that a view created by your e-Builder Administrator cannot be edited.
4. To make an editable copy of the view, select the **Make a copy of this view and edit it** check box.
5. To hide the copy of the view from your list, select the **Hide this view so it does not show in my list of views** check box.

You cannot edit the following Account View: All

However, you may make a copy of this view for yourself that you will be able to edit. You may also hide this view so it no longer shows up in your list of views.

Make a copy of this view and edit it

Hide this view so it does not show in my list of views

Continue **Cancel**

6. Click **Continue**.
7. Make all required changes on the Edit View page.
8. Click **Save**.

Fields available on the Add / Edit View page

- **View Name:** Name for the view.
- **Search in:** This filter allows you to narrow the results that appear in your view by any of the listed categories. Options will vary between modules and it is not available in Companies, Contacts, Cost and Schedule.

Search Options

Available in most modules

- **All Projects:** Included items from all projects.
- **My Projects:** Includes only items from the projects that you are a member of.
- **Projects I Administer:** Includes items only items from the projects that you are an administrator of.

Available only in the Calendar module (For instructions, see Create All Events Calendar View)

- **All Events:** Includes all events from projects across the account.
- **My Events:** Includes only the events that you are a participant of.

Available in the Processes module

- **Processes Initiated By Me:** Includes only the processes that you've initiated.
- **Processes In My Court:** Includes only the processes that are currently in your court.
- **All Processes:** Includes processes from every project on the account, including those that you've initiated, those that require your attention as well as processes initiated by others and are in the court of other account participants.
- **Process Type:** To restrict this view to a single process type, make a selection in this field.

Available in the Forms module

- **Forms Initiated By Me:** Includes only the forms that you've initiated.
- **Forms In My Court:** Includes only the forms that currently require your attention.
- **All Forms:** Includes forms from every project on the account, including those that you've initiated, those that require your attention as well as forms initiated by others and are in the court of other account participants.
- **Search Rules:** Allows you to further define the data elements to include in your view. Option will vary between modules, but a few common examples include: active status, project status, city, zip and custom fields.
- **Columns Displayed (numbered left to right):** This section allows you to choose the order in which columns will display in your view.
- **Sort View:** Select a column to be the first that displays and used to sort data in the views.