



# Trimble Unity Construct - Views Guide

September 2024

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# 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.

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## Access Views

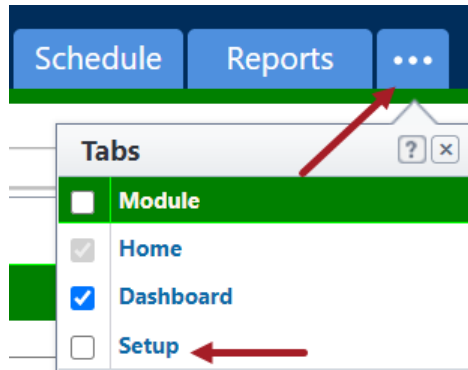
You can access views from either the Manage Views page or from the main page of each module.

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

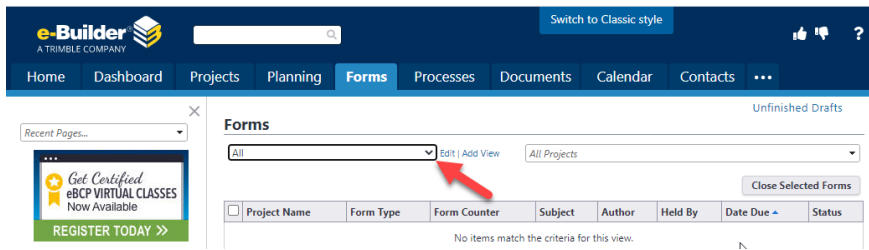
- **Edit:** Click to modify the details of the view (for personal views). Account level views cannot be edited, you can only create an editable copy of it.
- **Copy:** Click to copy the view. Creating a new view from a previous one is a quick and easy way to save a new view without having to start from 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.

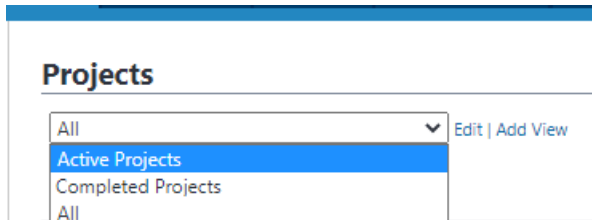
- **View Name:** Displays the name of the view.
- **Type:** Indicates whether it is a personal or an account view. Personal views are the ones that you've created while account views are created by an account administrator who has made the view accessible account-wide.
- **Status:** Indicates whether 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

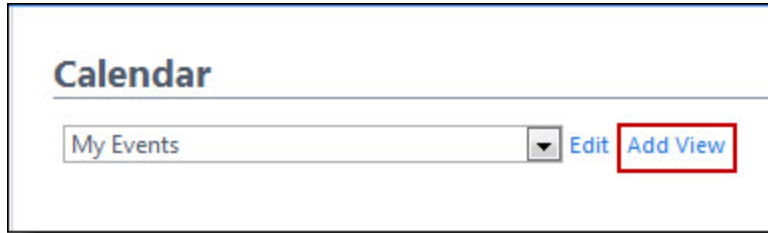
In e-Builder, every user has the ability to create custom views for the different modules they have access to. Views allow you to see specific information for one or more projects at a time, or multiple projects. You can create a number of custom views to suit your needs.

**Note:** When the multi-currency feature is set up for the account, the columns and filter criteria in a Cost view will display amounts in the account's default currency. The system converts the amounts from the project currency to the account's primary currency.

#### 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 covert:

- 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**.

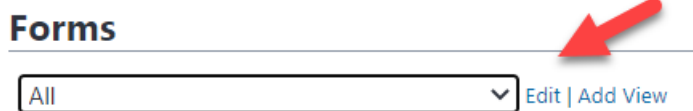
### Create an Editable Copy of an Account View

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.



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

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



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## 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.