e-Builder Equipment Management

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About Equipment Items

> **Note:** Equipment Manager is an account attribute that must be enabled by e-Builder Technical Support. To request access, please contact e-Builder Support.

With a large percentage of project costs allocated to furnishings and equipment - for example, up to 40% in medical facilities - it is important to be able to manage these expenses in detail. Equipment Manager allows owners to keep track of the costs associated with items that have been purchased by the owner and installed by either the owner or a contracting company. In this way, owners are aware of exactly what has been purchased, installed and which items are still in inventory, so you know exactly how much money has actually been spent on the project.

Optionally, you can incorporate equipment costs into the overall budget and expense process by tying equipment purchases to your commitments. This will give you an accurate representation of project costs and make the purchasing process more cohesive and better organized.

The following topics will assist you when working with equipment items:

- About Equipment and Cost Integration
- Access Equipment Items Page
- Import Equipment List
- Add Individual Equipment Items
- Update Date Required on Job

About Equipment and Cost Integration

The Equipment Manager module can be used in a number of ways. Equipment lists can be compiled and managed in e-Builder, integrated with the project budget, or if a third-party equipment planning tool is used, this module can simply be used to expose the details and the status of those items by way of importing equipment lists into e-Builder.

To integrate equipment items with costs, account administrators have to create corresponding custom fields for both equipment items and budget line items; and then complete the mappings for these two custom fields. For more information and instructions, see About Equipment and Cost Integration Settings. When identical values are selected for both equipment and budget item custom fields, the corresponding item will show up on the Equipment tab throughout certain pages of the Cost module (Line Item Details Page, Edit Line Item Page). Furthermore, users will then be able to choose equipment items to add to commitments. Doing so provides a more accurate view of project costs.

Related Topics:

- About Equipment Items
- Import Equipment List
- Add Individual Equipment Items

Access Equipment Items Page

Note: The Equipment Items module is not part of the Top Navigation Tabs, but it is accessible from the Project Menu.

To access the Equipment Items page

1. From the **Home** page, click the **All Projects** drop-down menu to select a project.
2. From the **Project Menu**, click **Equipment**.

   The Equipment Items page is displayed.

Import Equipment List

This task can be completed by:

- *Account Administrators*
- *Participants with 'Equipment Import' Permission*

Note: The Equipment List Import should be used if you are working with a third-party equipment planning system, since an External Item Identifier is required in the import file.

Using the equipment item import helps you avoid manually compiling the equipment list. The import file can include as much information about the items as possible, but at a minimum, equipment imports need to include the required fields listed below.

The following sets of information are included below:

- Required Fields for Import File
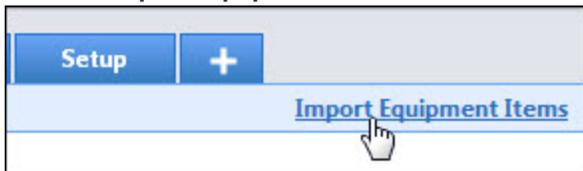- Import Equipment List

Required Fields for Import File

e-Builder Field Name/ Import File Column Header	Description	Required/ Optional
Project Identifier	Select a Project Identifier. This is a unique ID that will identify which project the schedule import is for, examples include project name and project number. Project identifiers are entered into e-Builder by administrators as required project custom fields. For multiple options to display, the **Do not allow duplicates** check box must be selected on the Edit Custom Fields page.	Required
Item Number	Map this field with its corresponding column in the Excel spreadsheet.	Required

e-Builder Field Name/ Import File Column Header	Description	Required/ Optional
	This column should list the item number for each of the equipment items.	
Item Name	Map this field with its corresponding column in the Excel spreadsheet. This column should list the item name for each of the equipment items.	Required
External Item Identifier	Map this field with its corresponding column in the Excel spreadsheet. This column should list the unique identifier obtained from the third-party equipment planning tool for each of the equipment items listed.	Required

Import Equipment List

To import the equipment list

1. Go to the Equipment Items page.

   For instructions, see Access Equipment Items Page.

2. Click the **Import Equipment Items** link located in the upper right-hand corner.

   The Import Equipment List page is displayed.

3. Click **Browse** to search for and select the import file.
4. Click **Next**.
5. If necessary, map built-in e-Builder fields with those in your Excel file.
6. Click **Next**.
7. Review the Import File Summary.
8. Click **Import**.

Add Individual Equipment Items

This task can be completed by:

- Account Administrators
- Participants with 'Add/Edit Equipment Items' Permission

Note: If your project is configured to use an external equipment manager you will not be able to add items manually.

Equipment items are added manually when this feature is used solely for equipment management within e-Builder Enterprise. Add items to build a list of equipment items.

To add equipment items

1. Go to the Equipment Items page.

    For instructions, see Access Equipment Items Page.

2. Click **Add Item**.

3. Complete all necessary fields.

4. Click **Save**.

Related Topics:

- Add Equipment Item Details Page Overview

Update Date Required on Job

This task can be completed by:

- Account Administrators
- Participants with 'Update Date Required on Job' Permission

You have the ability to update the dates that equipment items are required to be installed on job site. These dates can be completed upon importing the equipment list or while adding individual items, but can also be updated as necessary. Dates can be updated for more than one item at a time.

To update the date required on job

1. Go to the Equipment Items page.

    For instructions, see Access Equipment Items Page.

2. Select the item(s) whose dates you would like to update.

3. Click **Update Dates**.

    The Date Required on Job - Update dialog box displays.

4. In the **Date Required** field, enter the date that items are required to be installed.

5. *Optional:* Enter a note about this deadline and/or installation in the **Date Required Note** field.

6. Click **Update**.

Related Topics:

- Equipment Items Page Overview
- Add Equipment Item Details Page Overview

Equipment Items Page Overview

The Equipment Items page allows you to manage the equipment list. The following actions can be taken from this page:

- Import Equipment List
- Add Individual Equipment Items
- Update Date Required on Job

Fields and Buttons

The fields and buttons located on this page are:

Filter Equipment Items

Use the equipment items filter to narrow equipment item results. This filter can be collapsed to increase screen real estate.

- **Item Name**: To filter for a specific equipment item, enter the name of the item in this field.
- **Manufacturer**: To filter for equipment items made by a particular company, enter the name of the manufacturer in this field.
- **Department**: To filter for specific receiving departments, enter the name of the department that would have received the item in this field.
- **Ship to**: To filter for a specific location, enter the address or location that items were shipped to.
- **Budget Line**: To filter for equipment items that are tied to a particular budget line item, click this drop-down arrow to make a selection.
- **Commitment Number**: To filter for equipment items that are tied to a particular commitment, enter the commitment number in this field.
- **Model**: To filter for a particular model, enter the model name or number in this field.
- **Vendor**: To filter for equipment items distributed by a particular vendor, enter the name of the vendor in this field.
- **Room Number**: To filter for equipment items sent to or stored in a particular room, enter the room number in this field.
- **Date Required On Job**: To filter for equipment items that are required to be installed by a certain date, enter the date range in these fields.
- **Associated To Commitment Item**: To filter for equipment items that are associated to or excluded from a commitment item association, click the drop-down arrow and select yes or no.
- **Commitment Status**: To filter for equipment items that are associated to a commitment of a particular status, click this drop-down arrow to select the status to filter by.
- **Clear**: Click to clear the filter.
- **Filter**: Click to filter by entered criteria.

Equipment Items

- **Add Item**: Click to open the Add Equipment Item Details page and manually enter the details of a new equipment item. For instructions, see Add Individual Equipment Items.

  Note: This option is only available if the project is NOT configured to use an external. equipment management tool. See About Equipment and Cost Integration for more information.

- **Delete Item**: Click to delete selected equipment items.

  > **Note:** This option is only available if the project is NOT configured to use an external. equipment management tool. See About Equipment and Cost Integration for more information.

- **Update Dates**: Click to update the date that equipment items are required to be installed at the job site for selected equipment items. If multiple items have an identical Date Required on Job date, select these items and then click this button.

  > **Note:** This option is only available if the project is NOT configured to use an external. equipment management tool. See About Equipment and Cost Integration for more information.

- **Item Number**: This column displays the item number. Click the item number to open the Equipment Item Details page.
- **Item Name**: This column displays the name of the item. Click the item name to open the Equipment Item Details page.
- **Model**: This column displays the item's model name and/or number.
- **Manufacturer**: This column displays the manufacturer's name.
- **Department**: This column displays the department the item was delivered to.
- **Room Number**: This column displays the room number that the item was delivered to.
- **Date Required on Job**: This column displays the date that the item is required to be installed at the job site.
- **Need by Date**: This column displays the date by which the item should be received.

Add Equipment Item Details Page

This page allows you to add individual equipment items to e-Builder. Items can also be added en masse, by importing the equipment list. Below are descriptions of the fields and buttons located on this page.

Fields and Buttons

The fields and buttons located on this page are:

- **Save**: Click to save the details of the equipment item.
- **Cancel**: Click to discard changes. All unsaved data will be lost.

Details

- **Project Name**: Displays the project name.
- **Item Name**: Enter the name of the item.
- **Model**: Enter the name of the model.
- **Manufacturer**: Enter the name of the equipment's manufacturer.
- **Vendor**: Enter the name of the vendor that distributes the equipment item.
- **Item Number**: Enter the item number.
- **Is Taxable**: Select this check box to indicate whether or not this item can be taxed.
- **Manufacturer Number**: Enter the manufacturer's phone number.
- **Vendor Number**: Enter the vendor's phone number.

Pricing Details

- **Quantity**: Enter the amount of this item that's being added.
- **Subtotal**: Enter the total about for this item after fees and taxes.
- **Freight Subtotal**: Enter the amount paid to transport this item.
- **Install Subtotal**: Enter the total amount incurred to installed this item.
- **Total Tax**: Enter the total amount paid for tax on this item.
- **Total Config**: Enter the total amount paid to configure the item.
- **Cost**: Enter the price of the item.
- **Tax**: Enter the amount of tax paid on this item.
- **Freight Tax**: Enter the amount of freight tax paid on this item.
- **Install Tax**: Enter the amount of tax paid to install this item.
- **Total Cost**: Enter the total cost of this item including taxes and fees.

Delivery Details

- **Department**: Enter the department for which this item is being delivered.
- **Ship To**: Enter the address this item was shipped to.
- **Room Number**: Enter the room number where this item will be delivered or stored.
- **Date Required on Job**: Enter the date in which the item is required to be installed.
- **Need by Date**: Enter the date by which the item needs to be delivered.

Custom Fields

If applicable, equipment item custom fields display in this section. Custom fields can be used to capture additional information, but with equipment items, they are also necessary for integrating equipment purchases with the project budget.

For more information, see About Equipment and Cost Integration.

Administrators, see About Equipment and Cost Integration Settings for setup instructions.