



# e-Builder Projects Module

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# About Projects Module

The Projects module enables administrators to configure all project members to view key project information. It houses important details of the project such as the address, project-related web links, and the project's start and target dates. It also provides the ability to set some fundamental project settings like calendar exceptions and custom fields. Project managers may choose to include renderings of the completed project and project-related URL's for convenient access to additional resources. This module also provides a means for participants to message one another.

Account and project administrators will use this module to create additional projects in e-Builder as they are created in the field. Many of the features of Projects are targeted to the administrator's role of setting up project details and managing project participants level of access, their group and role associations.

## Access Project Details Page

There are two ways to access the Project Details page. The first method is from the Top Navigation tabs, which should be used if you are not already in a project. However, if you are in another module within the same project, the best method of access is from the Project Menu, which will eliminate the need to reselect your project.

### To choose a project

1. Click **Projects** from the top navigation tabs.
2. Choose a project from the **All Projects** menu.

The Project Details page is displayed.

### To remain in the current project

If you are already within a project, you can access the Project Details page via the Project Menu located in the Left Navigation Pane.

- Click **Details**.

The Project Details page is displayed.

## Access Project Participants Page

There are two ways to access the Project Participants page. The first method is from the Top Navigation tabs, which should be used if you are not already in a project. However, if you are in another module within the same project, the best method of access is from the Project Menu, which will eliminate the need to reselect your project.

### To choose a project

1. Click **Projects** from the top navigation tabs.
2. Choose a project from the **All Projects** menu.  
The Project Details page is displayed.
3. From the Project Menu, click **Project Participants**.

### To remain in the current project

1. Open the project.
2. From the Project Menu, click **Details**.

## Access Manage (Project) Form Types Page

The Manage Form Types page is only accessible by account and project administrators. There are two ways of accessing this page. The first method is from the Top Navigation tabs, which should be used if you are not already in a project. However, if you are in another module within the same project, the best method of access is from the Project Menu, which will eliminate the need to reselect your project.

### To choose a project

1. Click **Projects** from the Top Navigation tabs.
2. Choose a project from the **All Projects** menu.  
The Project Details page is displayed.
3. From the Project Menu, click **Manage Form Types**.

### To remain in the current project

If you are already within a project, you can access the Manage Form Types page via the Project Menu located in the Left Navigation Pane.

- From the Project Menu, click **Manage Form Types**.

## Add New Projects

### This task can be completed by:

- *Account and Project Administrators*
- *Participants with 'Add Project' Permission*

e-Builder Projects represent actual projects going on in the field and are typically created just as soon as a decision is made to move forward on a project. The sooner a project is created in e-Builder, the more lead time administrators have to set up project roles and permissions to prepare for user access.

### To add a new project

1. Click the **Setup** tab from the Top Navigation tabs.  
**Note:** If the Setup tab is not visible, click the drop-down arrow next to your username and click Setup.
2. In the **My Settings** section, expand **Membership**, and then click **Projects**.
3. Click **Add Project**.  
The Add Project page is displayed.
4. Complete all necessary fields.
5. Click **Save**.

### Related Topics:

- Add/Edit Project Page Overview

## Edit Project Details

**This task can be completed by:**

- Account Administrators
- Participants with 'Update Project Details' Permission

Project details can be modified throughout the life of the project and are necessary when key project information changes, such as project status, start and target dates, project administrators, custom fields and various other settings. For a list of all editable settings, see Add/Edit Project Page Overview.

### To edit project details

1. Go to the Project Details Page.  
For instructions, see Access Project Details Page.
2. Click **Edit**.  
The Edit Project page is displayed.
3. Complete all necessary fields.
4. Click **Save**.

## Bulk Edit Project Details

### Bulk Edit Project Fields

Making updates to project fields across many projects is now vastly more efficient. When you have a lot of updates to make, such as changing the Status or Target Date for multiple projects, it can be done at once in a bulk action. For example, update a custom field across 50 projects from the Project Details page with just a few clicks. The Bulk Edit capability is accessible anywhere you can edit projects.

Bulk Edit applies to updates of Project fields and Custom fields.

Permissions considerations: to perform Bulk Edits the user must have permission to update the field. The following permissions are validated:

- Add/edit project
- Custom field permissions

Upper Limits: Bulk Update enables updates across up to 50 projects for up to 25 fields at a time.

**Bulk Edit**

Select Fields

Available Fields	Filter by All Fields
	Project Status Target Date

Update Fields

Projects	* Project Status	Target Date
Main Tower	Active	05.30.2015
March 2016	Pending Apply to All	03.13.2016

### Real World Scenario Project Status Meeting Requires High Volume Updates

New information in a project status meeting require 50 projects to have their Status and Phase values updated in e-Builder. Rather than updating each project separately, which would take 4 clicks per project and potentially take more than an hour. With Bulk Edit, all 50 projects may be selected at once and the update take a matter of minutes.

### Applying Bulk Edit

1. Access Bulk Edit from Administration Tools > Projects > Manage Projects, or by clicking the Projects tab to access the Projects page, or My Settings > Membership > Projects
2. Select the Projects to be updated by clicking the check box next to the project and click the Bulk Edit button. Note you may select up to 50 projects at a time.
3. Select the Fields to be updated utilizing the Available fields filter or typing the name of the field in the input box
4. Update the value of each field individually if the values are different or click Apply to All if the same field value applies across projects.
5. Click Save. A confirmation message will appear when updates are successful or a warning if one of the entries is invalid.

### Enable Project Document Control

#### This task can be completed by:

- *Account Administrators*
- *Participants with 'Update Project Details' Permission*

Document control must be enabled first at the account level by the administrator, and also at the project level to allow users to complete document custom fields.

Even when document custom fields are available at the account level, this setting must be enabled on the individual project so that document custom fields are visible to participants.

#### To enable document control

1. Go to the Project Details page.  
For instructions, see Access Project Details Page.
2. Click **Edit**.
3. Click the **Settings** tab.
4. In the **Project Settings** section, select **Yes** in the **Enable Document Control?** field.
5. Click **Save**.

**Tip:** After account-level Document Control is enabled, all **new** projects will have the project-level Document Control also enabled by default ("Yes"). However, the setting must be enabled individually for previously created projects.

#### Related Topics:

- Project Details Page Overview
- Add/Edit Project Page Overview
- Enable/Disable Account Document Control (Admin)

## Make Form Types Accessible/Inaccessible

### This task can be completed by:

- *Account and Project Administrators*

Administrators have the ability to choose the form types to make available in their projects. When forms types are created at the account level, account administrators make projects assignments, but these can be modified at the project level as described below:

1. Go to the Manage (Project) Form Types page.  
For instructions, see Access Manage (Projects) Form Types Page.
2. To make form types accessible in the projects, select the form type from the Not Applied to this Site panel and click the right directional arrow to add it to the adjacent Applied To This Site panel.  
—Or—  
To make form types inaccessible from your projects, select the form type from the Applied to this Site panel and click the left directional arrow to add it to the adjacent Not Applied To This Site panel.
3. Click **Save**.

### Related Topics:

- Manage (Projects) Form Types Page Overview

## Export Project Address Book

### This task can be completed by:

- *Account & Project Administrators*
- *Participants with 'Manage Users' Permission*

The project address book includes the contact information of all project participants. This information can be exported in two formats: as a VB script, which will add participants to a folder in the Microsoft Outlook contacts and secondly as an Excel spreadsheet.

### To export the project address book

1. Go to the Project Details page.  
For instructions, see Access the Project Details Page.
2. Click **Export Address Book**.  
The Export Address Book window displays.
3. To create a folder in your Outlook contacts, select **VB Script (Outlook Only)**.



—Or—

To generate an Excel spreadsheet, select **Comma Separated Values**.

4. Click **Save**.

## View Sent Messages

### This task can be completed by:

- *Account and Project Administrators*

Administrators have access to outbound messages sent by their project participants, which are often useful during auditing. All outbound messages sent by project members are searchable, including invitations to bid, email messages and notifications.

### To search for and view outbound project participant messages

1. Access the Projects module.  
For instructions, see Access Project Details Page.
2. From the Project Menu, click **Sent Items**.  
All outbound messages display in the results table.
3. To filter specifically for items that meet certain criteria, complete some or all of the filter options.
4. Click **Filter**.

### Related Topics:

- Sent Items Page Overview

## Attach Documents to Project Details

Documents may be added to project details for recording keeping or to provide supportive information when necessary. Project charters or a project narrative for example might be attached to give participants insight into the initiatives that forged the project.

**Note:** Project attachments are viewable by all project members. To add restrictions, store files in the Documents module where you can edit folder permissions.

### Tip

In IE 10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Content Pane of the selected folder. Also, throughout e-Builder Enterprise, you can drag and drop files onto the Attached Documents tab using any of the aforementioned browsers.

**Note:** If you're not using the drag and drop feature, there are two methods for uploading documents: single file upload and multi-file upload. The latter allows you to drag and drop multiple files from your local machine onto the Upload Documents window. With single file upload, you're able to upload one file at a time. This is the default method, but you're able to switch between the two. A link for switching between the upload methods appear in the upper-right corner of the Upload Documents window when you start the document upload procedure.

### To attach documents to project details using multi-file upload

1. Go to the Project Details page.  
For instructions, see Access the Project Details Page.
2. Click the **Documents** tab.
3. Click **Attach Documents**. The Attach Documents window appears.
4. To attach files from your computer, click **Browse For Files....** to search for and select files. In the **Destination Folder** field, click **Browse** to select a folder from the e-Builder folder structure.  
—Or—  
To attach files from the e-Builder Document module, click **Attach files from the e-Builder Document module for the project**. Click **Browse For Files** to search for and select file.
5. Click **Attach Selected**.

### Attach Forms to Project Details

Forms can be attached to Project details as a record of the events that culminated the project. Examples include inspection and master permit forms.

**Note:** All project detail attachments are viewable by project members. Confidential forms should not be attached here. To learn more, see View Form Permissions.

#### To attach forms to project details

1. Go to the Project Details page.  
For instructions, see Access the Project Details Page.
2. Click the **Forms** tab.
3. To fill out a form, click **Fill Out Form**.  
The Fill out Form window appears. Select the form you want to fill out. Complete the form, and click **Post Form**.  
—Or—  
To attach a completed form, click **Attach Forms**.  
The Attach Forms window appears. Search for and select a form. Click **Attach**.

### Attach Processes to Project Details

Documents may be added to project details for recording keeping or to provide supportive information when necessary. For example, a project approval process or project funding authorization process might be attached.

#### To attach processes to project details

1. Go to the Project Details page.  
For instructions, see Access the Project Details Page.
2. Click the **Processes** tab.
3. Click **Attach Processes**.  
The Attach Processes window appears.

4. Search for and select a process.
5. Click **Attach**.

## Add/Remove Project Members

### This task can be completed by:

- *Account & Project Administrators*
- *Participants with 'Manage Users' Permission*

Project membership is necessary for participants to access and work in the project. Participants can be added to a project at any time. Removing users from the project will revoke all their access to project data. Effectively, the project will no longer display in their list of projects to choose from.

### To add or remove users from a project

1. Go to Project Settings.  
For instructions, see Access Project Settings.
2. In the **Administration Tools** section, click **Manage Users**.
3. Click the name of the person whose membership you want to manage.

The User Details page is displayed.

4. Click **Manage Membership**.

The Manage Membership for [user name] page is displayed with the Projects tab highlighted.

5. To make the person a member of a project, select the project from the All Projects panel and click the right directional arrow to add the project to the Projects That User is a Member Of panel.

**Note:** Users with Manage Users permission will only see the projects that they administer listed in the All Projects panel.

—Or—

To remove users from the project, select the user's name from the Projects That User Is A Member Of panel and click the left directional arrow to add them to the All Projects panel.

6. Click **Save**.

## Manage Project Member Permissions

### This task can be completed by:

- *Account and Project Administrators*

**Note:** Account administrations can modify permissions for the account from the Setup module. Project administrators can manage the individual project permissions by giving additional access rights, but project administrators cannot remove permissions.

Permissions can be managed per project role or for the individual user. Role permissions allow you to modify permissions for everyone in a select role, while individual permissions allow you to grant specific users additional access independent of the roles to which they belong.

#### To modify user permissions from the Projects module

1. Click **Projects** from the Top Navigation tabs.
2. Choose a project from the **All Projects** menu.  
The Project Details page is displayed.
3. From the Project Menu, click **Manage Permissions**.
4. To manage role permissions, within the **Roles** section, select the appropriate module tab and select the permission you wish to grant.

—Or—

To manage individual user permissions, select the appropriate module tab, scroll down to the **Users** section and select the permission you wish to grant.

**Note:** For a description of each permission setting, see Manage Project Permissions Page Overview.

5. Click **Save Changes**.

#### Reassign Work - Projects

##### This task can be completed by:

- *Account and Project Administrators*

Administrators have the ability to reassign work from one team member to another. While any administrator can do this, it is typically done by the project administrator. There are several reasons why this may be necessary; such as if the user's roles have changed; workload needs to be reallocated; the resource is on vacation, out sick or no longer available. Anything that is assigned to a resource can be reassigned, such as schedule tasks and workflow forms.

#### To reassign work

1. Go to the Project Participants page.
2. From the **Groups** section, click the title of user's associated group.
3. In the Content Pane, select the check next to user you want to reassign work from.
4. Click **Reassign Work**.  
The Reassign Work Items page is displayed.
5. Select the check box next to the task(s) to reassign.
6. Click the **Select a user to reassign work to** drop-down arrow to select the user to reassign items to.
7. Click **Reassign**.

## Send Messages

### This task can be completed by:

- *All Project Participants*

All project participants have the ability to send messages to fellow members of the project. All outbound messages will be searchable from the Sent Items page.

### To send messages from the Projects module

1. Go to the Project Participants page.  
For instructions, see [Access Project Participants Page](#). By default a list of all project members display in the Content Pane.
2. To send a message to project members, select the check box next to the user's name.  
—Or—  
To select users from a specific group, select the group name from the **Groups** section, and then select the check box next to the user's name.  
—Or—  
To select users from a specific role, select the role name from the **Roles** section, and then select the check box next to the user's name.
3. Click **Send Message**.  
The Email Users window appears.
4. Complete all necessary fields.
5. Click **Send**.

### Related Topics:

- [Email Users Window Overview](#)

## Create Groups

### This task can be completed by:

- *Account and Project Administrators*

The Administrators and Members groups are available by default. Members of the Administrators group have project administrator permissions. Additional groups can be created to help you categorize users in a way that is more meaningful to your organization. Document permissions can be assigned to groups and forms can also be sent to groups.

**Note:** Please be aware that regardless of the groups users belong to, permissions will still be based on roles and individual user permissions.

### Example

You might create a Safety Correspondents group that would allow you to communicate solely with the Contractor's Superintendent, Managing Contractor and Resident Engineer. This would be a more effective method of communicating, as opposed to sending a safety violation form, for example, to a particular role or having to pick these team members from a list of users. Furthermore, if this form and associated documents are stored in an e-Builder folder, permissions can be specified for this particular group.

#### To create a new group

1. Go to the Project Participants page.  
For instructions, see Access Project Participants Page.
2. In the **Groups** section, click **Create**.
3. In the **Group Name** field, enter a name.
4. Click **Save**.
5. To add members to the group, click **Manage this Group** in the Content Pane.  
The Manage Users window appears.
6. Select users to add to the group from the **Project Users** panel.
7. Click the right directional arrow to move selected users to the adjacent panel.
8. Click **Save**.

#### Related Topics:

- Rename Groups
- Project Participants Page Overview

#### Rename Groups

##### This task can be completed by:

- *Account and Project Administrators*

The Administrator and Members groups are available by default and cannot be altered. However, additional groups can be created and if necessary, renamed.

#### To rename a project group

1. Go to the Project Participants page.  
For instructions, see Access Project Participants Page.
2. In the **Groups** section, select the check box next to the group.
3. Click **Rename**.
4. Enter a new name in the **Group Name** field.
5. Click **Save**.

#### Related Topics:

- Create Groups
- Delete Groups
- Project Participants Page Overview

## Delete Groups

### This task can be completed by:

- *Account and Project Administrators*

The Administrator and Members groups are available by default and cannot be deleted or renamed. However, all other groups can be deleted if necessary.

### To delete a project group

1. Go to the Project Participants page.  
For instructions, see [Access Project Participants Page](#).
2. In the **Groups** section, select the check box next to the group.
3. Click **Delete**.  
You are prompted for confirmation.
4. Click **OK**.

### Related Topics:

- Create Groups
- Rename Groups
- Project Participants Page Overview

## Add Members to Project Roles

### This task can be completed by:

- *Account and Project Administrators*

e-Builder permissions are contained in roles. Roles exist at the account level, but project level roles can also be applied, which will allow you to give users the permissions of the select role for specific projects only. Adding a user to a role from the Project Participants page automatically adds them to the role for that project. If you wish to add users to account roles - which will give them the permissions of the role on all projects - you can do so from the Manage Users or Add Users page. For instructions, see [Add Users to Account Roles](#).

### To add users to a project-specific role

1. Go to the Project Participants page.  
For instructions, see [Access Project Participants Page](#).
2. Select the role from the **Roles** section.

3. Click **Add User**.
4. Select the check box next to the users you want to add to this role.
5. Click **Add User**.

A check mark is placed in the Project Role column, indicating that users are in this role at the project level.

#### Related Topics:

- Project Participants Page Overview
- About Project Level Roles

#### Add Members to Project Roles

##### This task can be completed by:

- *Account and Project Administrators*

e-Builder permissions are contained in roles. Roles exist at the account level, but project level roles can also be applied, which will allow you to give users the permissions of the select role for specific projects only. Adding a user to a role from the Project Participants page automatically adds them to the role for that project. If you wish to add users to account roles - which will give them the permissions of the role on all projects - you can do so from the Manage Users or Add Users page. For instructions, see Add Users to Account Roles.

#### To add users to a project-specific role

1. Go to the Project Participants page.  
For instructions, see Access Project Participants Page.
2. Select the role from the **Roles** section.
3. Click **Add User**.
4. Select the check box next to the users you want to add to this role.
5. Click **Add User**.

A check mark is placed in the Project Role column, indicating that users are in this role at the project level.

#### Related Topics:

- Project Participants Page Overview
- About Project Level Roles

#### Remove Members from Project Role

##### This task can be completed by:

- *Account and Project Administrators*



As team members take on new roles within an organization, it's important for administrators to also keep role memberships up-to-date in order to ensure participants have access only to data that is appropriate for their roles.

#### To remove users from a project role

1. Go to the Project Participants page.  
For instructions, see [Access Project Participants Page](#).
2. Select the role from the **Roles** section.
3. In the Content Pane, select the check box next to the user(s) you want to remove from the role.

#### Note:

A check mark in the Account Role column indicates that the user in this is role at the account level. If this is the case, removing them from the project role will have no effect. You must remove users from the account role before you're able to restrict their project role permissions.

	Account Role	Project Role
on	✓	✓
bot	✓	✓
		✓
		✓

4. Click **Remove User**.  
You are prompted for confirmation.
5. Click **OK**.

#### Related Topics:

- [Project Participants Page Overview](#)
- [About Project Level Roles](#)

#### Apply Project Role Templates

##### This task can be completed by:

- *Account and Project Administrators*

Project role templates can be applied to a project from two different locations; The Project Participants page and the Apply Templates page. Project Role Templates give administrators a way to predefine the roles that will be applied to different.

**Example**

PM1 may be the lead on all Campus projects, but PM2 is the lead on all Medical Center projects. Using project level role templates is a quick and easy way to apply project roles across your different project types.

In addition to being added to the template, users must also be members of the project for the template to take effect. Otherwise, non-project members will be ignored. For instructions, see [Add User to Projects](#).

**To apply project role templates**

1. Click the **Projects** tab on the Top Navigation Tabs.
2. Select a project from the Projects drop-down menu.
3. From the Project Menu, click **Project Participants**.

**Tip**

Click the Members link to ensure that the users in the project role template are also project members.

4. Click **Apply Role Template**.  
The Select Role Template dialog box displays.
5. Click the drop-down arrow to select the role template you want to apply.
6. Click **Apply**.  
A success message displays.

**Related Topics:**

- [About Project Level Roles](#)

## Projects Page Overview

The main Projects page can be customized with views, which will allow you to display only the information you need, based on selected views. From here, administrators and users with Add New Project permissions can also add new projects. For instructions on adding project views, see [Add Views](#).

### Add/ Edit Project Page

The Add/Edit Project page allows administrators and users with Add New Project permissions to add a new project and those with the Update Project Details permission to modify the details of an existing project.

Projects within e-Builder represent actual projects going on in the field and they are typically created just as soon as a decision is made to move forward on a project. The sooner a project is created within e-Builder, the better, as this will give account and project administrators enough lead time to set up project roles and permissions so project members can start contributing right away. Most of the details of a project can be modified at any time, which may be necessary if there's a new project administrator or the status of the project has changed, for example.

For instructions on how to access the Add Project page and add a new project, see [Add New Projects](#). For instructions on how to access the Edit Project page and edit the project details of an existing project, see [Edit Project Details](#).

The toolbar buttons and project settings available at the top of the Add/ Edit Project page are:

## Toolbar Buttons

- **Check Spelling:** Click to check the spelling of form field entries.
- **Save:** Click to save any changes.
- **Cancel:** Click to discard changes.

## Details Section

- **Project Name:** Enter the project name.
- **e-Builder Project Administrator:** If the project setting is configured to default to a specific project role, only users in that role display for you to choose from. See Complete Project Settings for more information. If user options do not already display, choose an administrator for this project.
- **Description:** Enter a description of this project. This can be used to give project administrators and members of the project additional information about the project.
- **Project Status:** Choose a project status from this drop-down menu. Default statuses are available, but the list of statuses may be customized by account administrators. For more on this setting, see Managing Project Statuses.
- **Project Photo:** Click **Browse** to select a picture of this project.
- **Address:** Enter the address of the project site. This information will be available from the Project Details page.
- **City:** Enter the city location of the project site.
- **State / Province:** Enter the state location of the project site.
- **Zip / Postal Code:** Enter the zip code of the project site.
- **Country:** Enter the country of the project site.
- **Start Date:** Enter the date that the project will begin.
- **Target Date:** Enter the date that the project is scheduled to end.
- **Project Webcam URL:** If available, enter the URL of the webcam at the project site.

The tabs available on the Add/ Edit Project page are:

## Custom Fields Tab

If there are project custom fields available, they display on this tab. Custom fields allow you to group or filter information according to specific business processes in your reports. For more information, see About Global Custom Fields.

## Settings Tab

### Project Settings

- **Project Access:**
  - **Yes** - This is the default selection. Select this option to allow users to log in to this project.
  - **No** - Select this option to restrict users from logging into this project. If a project is still being set up, administrators may choose to temporarily restrict access.
- **Deny Techsupport Access?:**
  - **Yes** - Select this option to disallow e-Builder technical support from accessing this project. Tech Support access may be necessary for troubleshooting issues users might

experience. However, projects that include confidential content may need to be restricted.

- **No** - This is the default selection. Select this option to allow e-Builder technical support to access this project whenever necessary. Tech support might need access to assist users when troubleshooting issues that might arise.
- **Enable Document Control?**: Document control makes document custom fields available on a project. Even if document custom fields exists, unless this setting is enabled, users will not be able to complete these fields on a project.
- **Equipment Management Tool Integration?**: The Equipment Management feature allows you 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. Optionally, equipment purchases can be tied to commitments for a more accurate representation of project costs. To learn more, see [About Equipment Items](#).
  - **Yes** - Select to enable equipment management integration on this project. This setting will restrict the Equipment Manager feature so that all updates to the equipment list can only be done outside of e-Builder. This feature would be used strictly for budgeting and viewing the equipment list and the status of equipment items. When this setting is enabled, the equipment list cannot be compiled or managed in e-Builder, but items can still be tied to the budget.
  - **No** - This is the default selection. Select to maintain full use of the Equipment Management feature.
- **Plan Room Access**: This setting allows you to determine how the plan room will be accessed. For more information, see [About the Plan Room](#).
  - **None** - This is the default selection. Select to restrict all access to the plan room.
  - **Internal Only** - Select to limit plan room access only to those users who can access e-Builder. If this option is selected, users will only be able to access the plan room through e-Builder; a URL will not be generated.
  - **Public** - Select to automatically generate a URL from which users can access the plan room. After changes are saved, this URL displays in the External Plan Room URL field located on the Project Details page.
  - **Shared Password** - Select to create a shared password for users to enter when accessing the plan room.
    1. Enter a password in the **Shared Password** field.
    2. Re-enter this password in the **Confirm Password** field.

## Project Currency

This section is displayed only if the multi-currency feature is enabled for the account. This section is visible only to users with View Cost permissions.

- **Project Currency**: Select the currency to use for the project. The project currency indicator (currency code) will be displayed on the top of every Cost page. The project currency is set to the account currency by default if no project currency has been specified during project creation. This setting can be edited by Project Administrators and can be changed to any of the pre-

defined currency types on the account as long as there is no cost data set up (eg., line items or funding allocation).

**Tip:** To find a currency quickly, enter the currency name in the Project Currency text box and select it from the search results.

### Workflow Settings

- **Workflow Due Date Offset:** Enter the number of days that the workflow forms are due after it has been initiated. For example, if workflow forms should be submitted, within seven days of being received, enter "7" in this field.

### Project Calendar

This setting allows you to configure calendar settings, which will influence the project calendar and schedule.

- **Work Day Start Time:** Enter the time that the work day will begin for this project.
- **Work Day End Time:** Enter the time that the work day will end for this project.
- **Work Week:** Choose the days of the week that will make up the work week for this project.

### Calendar Exceptions

This section allows you to determine the days that will be treated as an exception to the general rule, such as holidays that fall on typical working days. From this page you can choose particular dates and mark them as working or non-working days. Identifying these days at the onset of a project helps managers plan more effectively.

- **Date:** Enter a date to add as an exception or click the calendar icon to choose one directly from the calendar. In the adjacent box, choose whether this is a working or non-working day.
- **Add:** Click to add the entered date exception to the list of calendar exceptions.
- **Delete:** Click to delete the selected calendar exception date.

## Project Details Page

The Project Details page may be the most frequently viewed page among project members, as it provides key information about the project, such as project name, the administrator, the status of the project and the start and target dates, for example. All project participants have access to this page, although certain data will be exclusive to administrators and users with certain project permissions.

The toolbar buttons and sections on the Project Details page are:

### Toolbar Buttons

- **Export Address Book:** Click to export the project address book either as a VB Script, which can be used to import contacts into Outlook or an Excel spreadsheet.
- **Printable Participants Directory:** Click to generate a printable directory of project participants.
- **Edit:** This button is only available to administrators and users with Update Project Details permissions. Click to edit project details.
- **Cancel:** Click to discard changes.

### Details Section

- **Project Name:** Displays the name of the project.
- **e-Builder Project Administrator:** Displays the name of the project administrator.
- **Description:** If available, displays a description of this project.
- **Project Status:** Displays the status of the project.
- **Address:** Displays the address of the project site..
- **Country:** Displays the country where the project is taking place.
- **Start Date:** Displays the date that the project will begin.
- **Target Date:** Displays the date that the project is scheduled to end.
- **Project Webcam:** If available, displays the URL of the webcam at the project site.
- **Web Links:** If available, displays the web address of a project-related website.

The tabs on the Project Details page are:

### Custom Fields tab

If there are project custom fields available, they display on this tab. Custom fields allow you to group or filter information according to specific business processes in your reports. For more information, see About Global Custom Fields.

Project level options are available for projects that have a Drop Down, Multiple Pick, Radio Button or a Checkbox data type selected. This is available for custom fields and Process Data Fields only. When configuring a field of one of these types, you now have the ability to set the options at the:

- Account Level
- Project Level: Options can be different project by project

### Notes tab

This tab displays all available notes and allows you to add new notes about the project. Once notes are added, they cannot be edited or deleted. Users with 'Manage Private Notes' permissions are able to add and view private project notes.

### Documents tab

This tab displays all documents that have been attached to this project. From here you are also able to attach documents to the project. For instructions, see Attach Documents to Project Details.

### Forms tab

This tab displays all forms that have been attached to this project. From here you are also able to attach forms to the project. For instructions, see Attach Forms to Project Details.

### Processes tab

This tab displays all processes that have been attached to this project. From here you are also able to attach processes to the project. For instructions, see Attach Processes to Project Details.

### Settings tab

#### Project Settings

- **Project Access:** This field is visible only to administrators and users with Update Project Details permissions. This setting indicates whether or not users are allowed to log in to the project. If a project is still being set up, administrators may choose to temporarily restrict access.
- **Deny Techsupport Access?:** Indicates whether or not e-Builder Technical Support is able to access this project. Tech Support access may be necessary for troubleshooting issues users might experience. However, projects that include confidential content may need to be restricted.
- **Enable Document Control:** This field is visible only to administrators and users with Update Project Details permissions. This setting indicates whether or not document control is enabled. Document control allows document custom fields to be completed on a project. Even if document custom fields are available, unless this setting is enabled, users will not be able to complete these fields on a project. For more information, see Add Document Custom Fields.
- **Plan Room Access:** Displays the level of access for the Plan Room. For more information on this feature, see About the Plan Room. Options include the following:
  - **None:** Access to the Plan Room is restricted.
  - **Internal:** Plan Room access is limited to licensed e-Builder users only. Users are only able to access the plan room through e-Builder; a URL is not generated with this access type.
  - **Public:** The Plan Room is publicly enabled and can be accessed via the URL that appears in the following **External Plan Room URL** field.
  - **Shared Password:** The Plan Room can only be accessed using a password, which can be obtained by an account or project administrator.
- **Equipment Management Tool Integration?:** Indicates whether or not the project is integrated with a third party equipment management tool. For more information, see About Equipment Items. The options are as follows:
  - **Yes:** This project is integrated with a third-party equipment management tool; therefore the use of this feature within e-Builder is limited. Updates to the equipment list can only be done outside of e-Builder. Within e-Builder, this feature can only be used for budgeting and viewing the equipment list and the status of equipment items.
  - **No:** This project is not integrated with a third-party tool and maintains full use of the Equipment Management feature.

### Workflow Settings

- **Workflow Due Date Offset:** Enter the number of days that the workflow forms are due after it has been initiated. For example, if workflow forms should be submitted, within seven days of being received, enter 7 in this field.

### Project Currency

This section is displayed only if the multi-currency feature is enabled for the account. This section is visible only to users with View Cost permissions.

- **Project Currency:** Select the currency to use for the project. The project currency indicator (currency code) will be displayed on the top of every Cost page. The project currency is set to the

account currency by default if no project currency has been specified during project creation. This setting can be edited by Project Administrators and can be changed to any of the pre-defined currency types on the account as long as there is no cost data set up (eg., line items or funding allocation).

**Tip:** To find a currency quickly, enter the currency name in the Project Currency text box and select it from the search results.

### Project Calendar

This section includes general information about the project's calendar, such as the start and end times of the work day and the days that make up the work week. These settings influence the project calendar and schedule modules only. They do not affect due dates and escalation calculations in areas such as processes, submittals and forms.

- **Work Day Start Time:** Displays the time that the work day begins.
- **Work Day End Time:** Displays the time that the work day ends.
- **Work Week:** Displays the days of the week that makes up the work week.

### Calendar Exceptions

This section lists all the days that are treated as exceptions to the general rule, such as holidays that fall on typical working days. Knowing these days early on allows you to plan effectively. Calendar Exceptions can also be created at the account level by the administrator. These exception dates apply to every project in the account. When you edit the Settings tab, exceptions with a grayed out checkbox are account level and cannot be changed.

**Note:** If the Multiple Calendar or Resource Management features are activated, then Calendar Exceptions from Project Details are no longer connected to the schedule module. Non-working time is defined on each individual calendar from the Working Time button on the schedule toolbar.

### Apply Project Templates Page

After a project is created, administrators can apply a project template to get the new project set up more quickly. Templates are a compilation of structures from other areas of e-Builder Enterprise that can be applied to your current project. Certain projects may share similar characteristics which makes a particular template appropriate for multiple projects. For example, public school projects might have the same project managers, administrators, facilities managers, and finance directors, which would allow you to reuse the same template (s) for all projects of this nature. Available templates are as follows:

- Project Templates (Document folder structure)
- Role Templates
- Schedule Templates
- Budget Templates
- Cash Flow Templates
- Funding Templates

### Fields and Buttons



The fields and buttons located on this page are:

- **Apply Templates** : Click to apply selected templates.
- **Cancel**: Click to discard changes.
- **Select a project template**: Projects selected from this menu will be used as a template for your selected project. After choosing a project, you'll have the option to copy all or some of the following sets of information:
  - List of users
  - Project groups
  - The Documents folder structure including documents, permission settings, folder subscriptions and custom fields
  - Calendar setting exceptions
- **Select a role template**: Click the drop-down arrow to select a role template. The content of each template may differ, but Role templates typically include a list of roles and users that belong to each role.
- **Select a schedule template**: Click the drop-down arrow to select a schedule template. The content of each template may differ, but schedule templates can include the following:
  - List of tasks
  - Duration of each task
  - Task predecessors
  - Task resource role
  - Manager role
  - Whether or not approval is required for changes to task dates
  - Whether or not approval is required before a task can be marked complete
  - List of master tasks and master processes.
- **Select a budget template**: Click the drop-down arrow to select a budget template. For more information, see Working with Budget Templates.  
The content of each template may differ, but budget templates can include the following:
  - Budget line items
  - Account codes
  - Formulas
  - Whether or not charges are allowed
  - Whether or not approval is required for budget changes
- **Select a cash flow template**: Click the drop-down arrow to select a cash flow template. The content of each template may differ, but cash flow templates are based on selected budget template line items, they may also be linked to schedule templates. For more information, see Working with Cash Flow Templates.
- **Select a funding template**: This option will only be available if advanced funding is enabled on the account. Click the drop-down arrow to select a funding template. These templates include a list of funding sources. For more information, see Working with Funding Templates.

## Project Participants Page

The Project Participants page lists all members of the project including available groups and roles. This page allows account and project administrators to take the actions listed below. All project members however are able to view user details and email fellow project participants.

The following actions can be taken from this page:

- Add/ Remove Project Members
- Create Groups
- Rename Groups
- Delete Groups
- Send Messages
- Remove Users from Project Role
- Reassign Work
- Apply Role Templates

**Note:** Keep in mind that some of the actions listed below are permissions based.

### Fields and Buttons

The fields and buttons located on this page are:

#### Groups

- **Create:** This link is only enabled for account and project administrators. The Administrators and Members groups are available by default and members of the Administrators group have project administrator permissions. Click to create a project group. Creating additional groups will help you better organize project members.
- **Rename:** This link is only enabled for account and project administrators. Click to rename existing groups.
- **Delete:** This link is only enabled for account and project administrators. Click to delete selected groups. The Administrators and Members groups are available by default and they cannot be deleted. Please note that if a group is deleted, the members of that group will not be removed from the account.
- **Administrators:** Displays by default. Members of this group have administrative access to the project. This group cannot be deleted or renamed. Click to see all members of the Administrator group.
- **Members:** Displays by default. This group includes all project members and cannot be deleted or renamed. Click to see all members of this group.

#### Roles

This section lists all available roles on the project. Click a title to see the members of the role in the adjacent Content Pane. All users are able to send messages to these members, but administrators are also able to add or remove users from a role on the project level.

#### Content Pane

The data that displays in the content pane is contingent on what is selected in the Groups/ Roles section located on the left side of the page. Before anything is selected, a list of all project members display in this area.

### Filter

- **First name:** Enter the first name of a user to filter for a specific person, or persons with the same first name.
- **Last Name:** Enter the last name of a user to filter for a specific person, or persons with the same last name.
- **Username:** Enter a username in this field to filter for a specific person.
- **Company:** Enter a company name to filter for users associated to a specific company.
- **Custom Field:** To filter users associated with a particular custom field, make a selection from this drop-down menu.
- **Filter:** Click to filter for entered criteria.
- **Clear:** Click to clear the fields in the filter.

### Content Pane - Members Group

These fields and buttons are specific to the Members group. A list of project members is the first to display when this page is accessed, before anything is selected. The members group cannot be deleted or renamed. It simply provides a list of all project members.

- **Manage Users:** This button is only visible to account administrators and appears when the Members group is selected. Click to open the Manage Users window where you can take any of the following actions:
  - Add New Users to Account
  - Add Users to the Project
  - Remove Users from Project
- **Send Message:** Click to send a message to selected users. The Email Users window appears.
- **Remove from Project:** This button is only visible to account and project administrators. Click to remove selected users from the project.
- **Reassign Work:** This button is only visible to account and project administrators. Click to reassign work items for a selected user. The Reassign Work Items page is displayed. For instructions, see Reassign Work.
- **Apply Role Template:** This button is only visible to account administrators. Role templates are created by account administrators and can be used to quickly set up role permissions and project access. For instructions, see Apply Role Templates.
- **Name:** This column displays the user's name. Click to open the User Details page.
- **Username:** This column displays the user's username.
- **Company Name:** This column displays the company that the user is associated with.
- **Date Added:** This column displays the date that the team member was added to the project.

### Content Pane - Group

This section lists and describes the fields and buttons that display when a particular group is selected.

- **Manage this Group:** This button is only visible to account and project administrators and appears when a group other than Members is selected. Click to open the Manage Users window where you can take any of the following actions:
  - Add New Users to Account
  - Add Users to the Project
  - Add Users to the Administrator Role
- **Send Message:** Click to send a message to selected users. The Email Users window appears.
- **Remove from Group:** This button is only visible to account and project administrators and appears when a group other than Members is selected. Click to remove selected users from the selected group.
- **Reassign Work:** This button is only visible to account and project administrators. Click to reassign work items for a selected user. The Reassign Work Items page displays. For instructions, see Reassign Work.
- **Name:** This column displays the user's name. Click to open the User Details page.
- **Username:** This column displays the user's username.
- **Company Name:** This column displays the company that the user is associated with.
- **Date Added:** This column displays the date that the team member was added to the project.

#### Content Pane - Roles

- **Send Message:** Click to send a message to selected users. The Email Users window appears.
- **Add User:** This button is only visible to account administrators and appears when a role is selected. Click to add a user to the selected role at the project level. The Add Users window appears. See Also: About Project Level Roles.
- **Remove User:** This button is only visible to account administrators and appears when a role is selected. Click to remove selected users from the project role.

**Note:** This action does not remove users from the account, nor does it remove them from the project. It also does not remove them from the account level role; it only removes them from the project level role.

For more information, see:

- About Project Level Roles
- Remove Users from Account Level Roles
- **Name:** This column displays the user's name. Click to open the User Details page.
- **Username:** This column displays the user's username.
- **Company Name:** This column displays the company that the user is associated with.
- **Account Role:** A check mark in this column indicates that the user is in this role on the account level. For more information, see:
  - Add Users to Project Roles
  - About Project Level Roles

**Note:** Account role permissions are applied to all projects within the account. Therefore, users in an account role cannot be removed from this role on the project level. To ensure that only project level roles are applied, remove the user from the role at the account level.

- **Project Role:** A check mark in this column indicates that the user is in this role on the project level.

For more information, see:

- Add Users to Project Roles
- About Project Level Roles

## Manage (Projects) Form Types Page

The Manage Form Types page in the Projects module is accessible to account and project administrators and it allows you to choose the form types that should or should not be available in your projects. When forms types are created at the account level, account administrators are able to make projects assignments, but these can be modified at the project level from this page. For instructions, see Make Form Types Accessible/Inaccessible.

### Fields and Buttons

The fields and buttons located on this page are:

- **Save:** Click to save changes.
- **Cancel:** Click to discard changes. All unsaved changes will be lost.
- **Not Applied to this Site:** This panel lists all of the form types that are currently unavailable in the project. To make form types available, click the right directional arrow to add the title to the adjacent Applied to this Site panel.
- **Applied to this Site:** This panel lists all of the form types that are currently available in the project. To make form types inaccessible from this project, click the left directional arrow to add the title to the adjacent Not Applied to this Site panel.

## Manage Users Window

This window allows account administrators to add new users to the account. Users with the Manage Users permission are able to add and remove users from the project, but only from the Manage Membership page, for instructions, see Add/Remove Project Members. Project access can be managed from other areas of e-Builder Enterprise, such as in the Setup module, but the Manage Users page is convenient to use when account administrators are already working within a project.

### Fields and Buttons

The fields and buttons located on this page are:

- **Add New User:** Click to add a new user to the account. You will be redirected to the Add New User window.
- **Available Users:** This section lists all account users that are not members of the project. Pull users from this list to be added as project participants. Use the filter to narrow down the list of users to choose from. To add users to the project, select their name(s) and then click the right directional arrow to add

them to the adjacent Project Users panel.

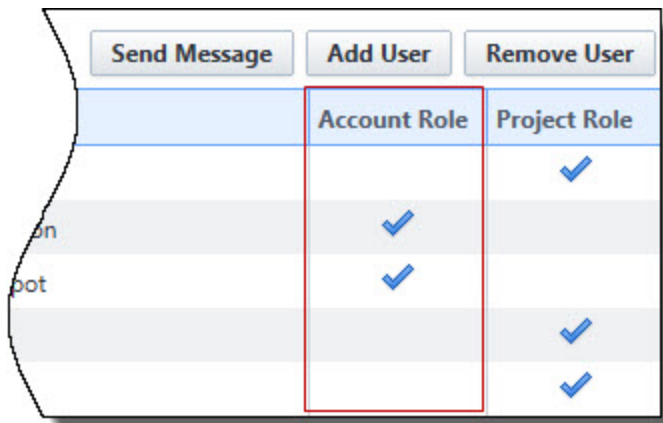
- **Filter Users:** Use these filter options to narrow down the list of available users.
- **Removed Users:** If a user is removed from the project, they will display in this panel while this window remains open. This allows you to review the list of removed users before saving your changes.
- **Notify users removed from site:** Select this check box to send an automated message to users listed in the Removed Users panel, informing them that they have been removed from the project.
- **Project Users:** Lists all project members. Click the left directional arrow to remove users from the project. Doing so will revoke all access these users have to project data. Effectively, the project will no longer display in their list of projects to choose from.
- **Notify users added to site:** Select this check box to send an automated message to users, informing them that they've been added to the project.
- **Include username and password:** Select this check box to send usernames and passwords to newly added project members.
- **Save:** Click to save changes.
- **Cancel:** Click to discard changes.

### Add Users to Role Window

This window allows account administrators to add users to project level roles. If you wish to add users to account roles, you can do so from the Manage Users or Add Users page. For instructions, see Add Users to Account Roles.

### Synopsis of Account and Project Level Roles

All roles are created at the account level. However, you do not have to add users to account roles if you wish to place them in different roles across multiple projects. Adding users to account roles will give them the permissions for that role on all projects they have access to. Project level roles however, allow you to give users in said role permissions for specific projects. After users are added to the project role, a check mark appears in the Project Role column on the Project Participants page, indicating that the user is in the select role at the Project Level. For more information, see About Project Level Roles.



### Fields and Buttons

The fields and buttons located on this page are described below.

### Filter Users

Use this filter to narrow down the list of users to add to the role.

- **Show/Hide Advanced Filter:** Click to show or hide additional filter options as follows:
  - Email Address
  - City
  - Zip
  - Custom Fields
  - Type of Business
  - State/Province
- **First Name:** Enter a first name to filter for specific users.
- **Username:** Enter a username to filter for a specific user.
- **Last Name:** Enter a first name to filter for specific users.
- **Company:** Enter a company to filter by only those users associated with a specific company.
- **Filter:** Click to filter for entered criteria.

### Users

- **Add User:** Click to add selected users to the role.
- **Cancel:** Cancel to discard any changes and close this window.
- **Name:** Displays the name of users which can be added to the role.
- **User Name:** Displays the username of the corresponding user.
- **Company Name:** Displays the name of the company users are associated with.
- **Date Added:** Displays the date that users were added to the account role.

### Email Users Window

The Email Users window allows you to send messages to project participants; both e-Builder licensed and non-e-builder licensed participants. All project participants are able to access this page, although some functions will only be available to administrators. This window displays as a result of clicking the Send Message button on the Project Participants page. For instructions, see Send Messages.

### Fields and Buttons

The fields and buttons located on this page are:

- **Send:** Click to send the message.
- **Cancel:** Click to discard changes and close this window.
- **To:** If you selected users from the Project Participants page, they display in this field. You can add additional recipients by clicking the Lookup button or typing in one email address per line.
- **Lookup:** Click to search for and select additional users to message.
- **CC:** Enter the email address of users to copy on the message.

- **Subject:** Enter the subject of the message in this field.
- **Body:** Enter your message in this field.
- **Include Welcome Message:** This option is visible to account and project administrators only. Select to include an automated welcome message with your message.
- **Send username and password notification:** This option is visible to account and project administrators only. Select to also send recipients usernames and passwords with the message.

## Reassign Work Items Page

The Reassign Work Items page allows account and project administrators to reassign work from one team member to another. Project administrators may have to do this when resources go on vacation, are out sick, change roles or are no longer available. Anything that is assigned to a resource can be reassigned, such as schedule tasks and workflow forms.

The descriptions for the buttons and fields on the Reassign Work Items page are:

### Toolbar Buttons and Fields

- **Work Item Description:** Displays the description of the item.
- **User's Involvement:** Displays the user's role on the item.
- **Select a user to reassign work to....:** Click this drop-down arrow to select the users to reassign work to.
- **Notify user:** Select this check box to send a notification to the user to whom the work is reassigned.
- **Reassign:** Click to reassign items, after work items and a new resource has been selected.
- **Cancel:** Click to discard changes.

## Manage Form Types (Projects) Page

This page is available to account and project administrators and allows you to choose form types to include or exclude from the project. When the form type is created at the account level, account administrators are able to make the form available in all projects or just select ones. All existing form types appear on this page in their respective panels, either Not Applied To this Site or Applied To This Site. Use this page to review or modify the list of form types that are accessible in this project. Changes made on this page will automatically adjust account settings and vice-versa.

### Fields and Buttons

The fields and buttons located on this page are:

- **Save:** Click to save changes.
- **Cancel:** Click to discard changes.
- **Not Applied to This Site:** Lists the form types that are not currently accessible from this project. To make this form type available in this project, select it and then click the right directional arrow to add it to the adjacent Applied To This Site panel.
- **Applied to This Site:** Lists the form types that are currently accessible from this project. To make this form type unavailable in this project, select it and then click the left directional arrow to add it to the adjacent Not Applied To This Site panel.



## Project Process Notification Settings Page

The Process Notification Settings page allows account administrators to determine which users should receive notifications for process instances, based on whether or not they are an actor on the step.

### Fields and Buttons

The fields and buttons located on this page are:

- **Save:** Click to save changes.
- **Cancel:** Click to discard changes.
- **Role:** Select the appropriate role to choose the team members that should receive process notifications.
- **Select users to receive notifications:** Users in the selected role appear in this section. Choose the users that should receive notifications and add them to the **Selected users** section.

### Actor Settings for Roles with Selected Users

- **Unselected users:** This section allows you to choose the users from the select role that should not receive notifications even when the process is in their court while including one of the following exceptions:
  - **but will be an actor on the process** - Unselected users in the role will not receive a notification, but still can take action on the process as an actor.
  - **and will not be an actor on the process** - Unselected users in the role will not receive the notification and will not be able to take action on the process, but will be 'requested comment' actor(s) type in the instance.

## Manage Permissions for Project

Account and project administrators can manage the permission settings for members and roles across all modules of a project. Permission settings are critical for user access rights to certain features. When troubleshooting access rights, user and role permissions should be the first area of investigation to ensure roles/users have appropriate access to product features. Typically, permissions are configured at the start of a project and as new project members are added on.

The top portion of this page is a filter that you can use to narrow down the list of roles/users that display in the table below it. The second portion of this page lists all account roles, and then team members. In e-Builder, account roles are used to group team members, permission for both of which can be modified on this page.

**Note:** Roles that appear in red are Administrator Roles. Administrator Roles are eligible to receive additional permissions typically reserved for the account administrator. For more information or for the list of additional permissions that can be granted, see About e-Builder Administrative Roles.

### Filter Roles and Users

To filter by roles and/ or users

1. In the Filter Roles and Users section, you can specify the following filter criteria:
  - **Roles:** Select this check box to filter for all roles.
    - **All Roles:** Lists all the user roles available on the account. For instructions on adding account roles, see Add New Account Roles.
    - **Admin Roles Only:** Select this check box to filter by Admin roles.
    - **Selected Roles:** Lists all roles that have been selected to be included in the filter. You can add or remove roles from the filter to the Selected Roles box using the directional arrows.
  - **Users:** Select this check box to filter for an individual user.
    - **User Name:** Enter the username of the user to filter by.
    - **First Name:** Enter a name in this field to filter by a user's first name.
    - **Last Name:** Enter a name in this field to filter by a user's last name.
    - **Select a custom field:** Click the drop-down arrow to select a custom field type to filter by. Click the Lookup button to view a list of qualifying custom fields.
  - **Show All:** Click to disregard filter entries and see all account roles.
2. Click **Filter**. The filter results are displayed.

#### To access the Manage Permissions for Project

1. Click **Projects** from the top navigation tabs.
2. Choose a project from the **All Projects** menu.  
The Project Details page is displayed.
3. From the Project Menu, click **Manage Permissions**.

### Permission Settings

To grant permission to a role, select the check box for each permission. A description of the permission settings available on each tab of this page is provided below.

**Note:** The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see About Project Level Roles.

#### Bidding tab

- **View Bidding:** Gives users in this role the ability to view an entire bid package.
- **Create Bid Package:** Gives users in this role the ability to create bid packages.
- **Modify Bidding:** Gives users in this role the ability to modify bid package details.
- **View/ Open Bid Tabulation:** Gives users in this role the ability to view and open the bid tabulation.

#### Calendar tab

- **Create Public Project Event:** Gives users in this role the ability to create public events. Everyone on a project is able to view public events, even if they are not an attendee of the event.

## Contacts tab

- **View Project Contacts:** Gives users in this role the ability to view contact details for the projects they have access to.

### Example

If there are 50 people in your company, but only five are working on a particular project, you may not want contractors to know every other contractor or A/E that you're working with.

## Cost tab

**Note:** Cost processes do not abide by these settings. Permissions for cost processes are set on the process properties page. For more information, see Properties Tab Overview.

- **View Cost:** Gives users in this role the ability to view the overall cost summary and all cost related information on the projects they have access to.
- **Add/Edit Budget:** Gives users in this role the ability to add and edit approved budgets and cash flow.
- **Add Budget Item:** Gives users in this role the ability to add budget line items to approved budgets and budget changes.
- **Approve Final Budget:** Gives users in this role the ability to approve the final budget.

**Note:** Users will not receive an email notification on approval requests unless the Notify user when approval requested setting is enabled in Cost Settings.

- **Approve Budget Changes:** Gives users in this role the ability to approve budget changes.
- **Add/Edit Commit:** Gives users in this role the ability to add and edit commitment changes.
- **Approve Final Commit:** Gives users in this role the ability to approve commitments.
- **Approve Commit Changes:** Gives users in this role the ability to approve commitment changes and change commitment line items.
- **Change Approved Commit Line Item:** Gives users in this role the ability to approve changes made to approved commitment line items.

### Example

If a commitment was accidentally saved against the Contingency budget line item, when it should have been saved toward General Costs, persons with this permission setting will have the ability to approve this change or make such changes themselves.

- **Add/Edit Actual:** Gives users in this role the ability to add and edit invoices.
- **Edit Retainage of Actual:** Gives users in this role the ability to manually edit item retainage amounts on commitment items in the 'Draft' or 'Received' status. If you select the Edit Retainage permission for a role or user, the check boxes for Add/Edit Actual and View Cost permissions will also be selected automatically for the role or user.
- **Approve Final Actual:** Gives users in this role the ability to approve invoices.
- **Change Approved Gen. Invoice Line Item:** Gives users in this role the ability to approve changes made to approved general invoice line items.

### Example

If an invoice was accidentally added toward Contingency, when it should have been added to General Costs, persons with this permission setting will have the ability to approve this change or make such changes themselves.

- **Import:** Gives users in this role the ability to import cost data.
- **Modify Forecast:** Gives users in this role the ability to make changes to the forecast. This permission setting will likely be restricted to project managers.

#### Documents tab

- **View All Sent Items:** Gives users in this role the ability to see all of their sent items as well as the items sent by everyone else.

#### Equipment Items Tab

- **View Equipment Items:** Gives users the ability to view the list of equipment items.
- **Add/Edit Equipment Items:** Gives users the ability to add and edit equipment items.
- **Update Date Required on Job:** Gives users the ability to update the date that items are required to be installed.

#### Funding tab

- **View Funding:** Ability to see funding sources under the Project Cost.
- **Add / Edit Funding:** Ability to Add a new funding source and complete deposits against the source.

#### Planning tab

- **View Planning Scenarios:** Gives users in this role the ability to view planning scenarios. In some cases, there may be someone responsible for managing capital plan and another responsible for scenarios.
- **Modify Planning Scenarios:** Gives users in this role the ability to add/edit planning scenarios.

#### Processes tab

- **Manage Workflow:** Gives users in this role the ability to manage process instances, which includes the right to override steps, update and take action on steps of the processes they have access to.

#### Projects tab

- **Update Project Details:** Gives users in this role the ability to update project details, such as project name, the project administrator, address, project start and end dates, and project custom fields.

#### Schedule tab

- **View Schedule:** Gives users the read-only ability to view the schedule from the Project menu.

**Note:** This permission is available only for accounts with the current schedule enabled.

- **Manage Schedule:** Gives roles or users the ability to add tasks and manage the schedule. This permission is available only for accounts with the current schedule enabled. For more information, see Manage Schedule Tasks.

**Note:** When the Manage Schedule permission is enabled, the View Schedule permission will also be enabled by default. If the View Schedule permission is disabled, the Manage Schedule Permission will also be disabled by default. However, changes to this permission will not cause any changes in the Manage Baselines permissions.

- **Manage Baselines:** Gives users in this role the ability to create and delete baselines.

**Note:** Users with this permission can overwrite the baseline after it has been created and saved.

### Submittals tab

- **View Submittals:** Gives users in this role the ability to view submittal items. When the **View draft submittals** setting is turned on, all team members who have the View Submittals permission will be able to see Submittal Register Items and Packages that are in Draft status.
- **Add/Edit Submittals:** Gives users in this role the ability to add and edit submittal items. This permission should be given to contractors, as they will need to add, edit and send submittal items for review.

### Time Tracking tab

- **Manage Project Bill Rates:** Gives users in this role the ability to manage project bill rates. Although rates can be set at the account level, they can also be modified at the project level. Changes made on either page are reconciled and updated simultaneously. For instructions, see Manage Project Bill Rates.

### Users tab

- **Manage Membership:** Gives users in this role the ability to manage the projects that users are on and user roles.

## Permissions By User Project Page

This page allows account and project administrators to manage the permission settings for users and roles across all modules. Permission settings are critical for user access rights to certain features. When troubleshooting access rights, user and role permissions should be the first area of investigation to ensure roles/users have appropriate access to product features. Typically, permissions are configured at the start of a project and as new project members are added on. However, as roles change and people move across departments, permissions should be updated accordingly.

The top portion of this page is a filter that you can use to narrow down the list of roles/users that display in the table below it. In edit mode, the second portion of this page lists all account roles, and then users. In view mode, only the list of users display. In e-Builder, account roles are used to group users, permission for both of which can be modified on this page. When managing user roles, it is important to ensure that each role is well defined and only includes those members that should have the access granted by that role's permissions. For instructions on adding account roles, see Add New Account Roles.

**Note:** Roles that appear in red are Administrator Roles. Administrator Roles are eligible to receive additional permissions typically reserved for the account administrator. For more information or for the list of additional permissions that can be granted, see About e-Builder Administrative Roles.

### To filter by users

1. In the Filter Users section, you can specify the following filter criteria:
  - **User Name:** Enter the username of the user to filter by.
  - **First Name:** Enter a name in this field to filter by a user's first name.
  - **Last Name:** Enter a name in this field to filter by a user's last name.
  - **Select a custom field:** Click the drop-down arrow to select a custom field type to filter by.
2. Click **Filter**. The filter results are displayed.

### To access the Permissions By User for Project

1. On the top navigation tabs, click the **Projects** tab.
2. Click the **Project** drop-down menu and select the project name. The **Projects** page is displayed.
3. On the left navigation menu under Project Menu > Details > Permissions by User.

## Permission Settings

A description of the permission settings available on each tab of this page is provided below:

**Note:** The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see About Project Level Roles.

### Bidding

- **View Bidding:** Gives users the ability to view an entire bid package.
- **Create Bid Package:** Gives users the ability to create bid packages.
- **Modify Bidding:** Gives users the ability to modify bid package details.
- **View/ Open Bid Tabulation:** Gives users the ability to view and open the bid tabulation.
- **Manage Templates:** Gives users the ability to manage bidding templates.

### BI Reports

- **View Report:** Gives users the ability to view BI reports.
- **Add / Edit Report:** Gives users the ability create and edit reports and dashboards.

### Calendar

- **Create Public Project Event:** Gives users the ability to create public events. Everyone on a project is able to view public events, even if they are not an attendee of the event.
- **Create Public General Event:** Gives users the ability to create public general events. Events are private by default.

### Contacts

- **View Contacts:** Gives users in this role the ability to view all contacts and contact details stored globally, even if the contact is not associated with a project.
- **View Project Contacts:** Gives users the ability to view contact details for the projects they have access to. Project participants are able to view project-specific contacts without having access to the entire global contact list.

**Example**

If there are 50 people in company, but only five are working on a particular project, you may not want contractors to know every other contractor or A/E that you're working with.

- **Add/Edit Contacts:** Gives users in this role the ability to add contacts, modify contact details and import contacts.

**Cost**

**Note:** Cost integrated processes do not abide by these settings. Permissions for cost processes are set on the process properties page. For more information, see Properties Tab Overview.

- **View Cost:** Gives users the ability to view the overall cost summary and all cost related information on the projects they have access to.
- **Add/Edit Budget:** Gives users the ability to add and edit approved budgets, funding and cash flow.
- **Add Budget Item:** Gives users the ability to add budget line items to approved budgets and budget changes.
- **Approve Final Budget:** Gives users the ability to approve the final budget.

**Note:** Users will not receive an email notification on approval requests unless the Notify user when approval requested setting is enabled in Cost Settings.

- **Approve Budget Changes:** Gives users the ability to approve budget changes.
- **Add/Edit Commit:** Gives users the ability to add and edit commitment changes.
- **Approve Final Commit:** Gives users the ability to approve commitments.
- **Approve Commit Changes:** Gives users the ability to approve commitment changes and change commitment line items.
- **Change Approved Commit Line Item:** Gives users the ability to approve changes made to approved commitment line items.

**Example**

If a commitment was accidentally saved against the Contingency budget line item, when it should have been saved toward General Costs, persons with this permission setting will have the ability to approve this change or make such changes themselves.

- **Add/Edit Actual:** Gives users the ability to add and edit invoices.
- **Edit Retainage on Actual:** Gives users the ability to manually edit item retainage amounts on commitment items in the Draft or Received status.
- **Approve Final Actual:** Gives users the ability to approve invoices.
- **Change Approved Gen. Invoice Line Item:** Gives users the ability to approve changes made to approved general invoice line items.

**Example**

If an invoice was accidentally added toward Contingency, when it should have been added to General Costs, persons with this permission setting will have the ability to approve this change or make such changes themselves.

- **Manage Templates:** Gives users the ability to manage cost templates. This setting might be useful if the workload needs to be shared among various people or departments.
- **Modify Forecast:** Gives users the ability to make changes to the forecast. This permission setting will likely be restricted to project managers.
- **Import:** Gives users the ability to import cost data.

### Documents

- **View All Sent Items:** Gives users in this role the ability to see all of their sent items as well as the items sent by everyone else.
- **Manage Quarantine:** Gives users in this role the ability to manage the spam quarantine. See About Spam Filter for more information on this feature.
- **Import:** Gives users in this role the ability to import document custom fields into one or more documents already within e-Builder. This can be used to provide a large amount of meta data to multiple documents using a single transaction.

### Equipment Items

- **View Equipment Items:** Gives users the ability to view the list of equipment items.
- **Add/Edit Equipment Items:** Gives users the ability to add and edit equipment items.
- **Update Date Required on Job:** Gives users the ability to update the date that items are required to be installed.

### Forms tab

- **Manage Form Instances:** Gives users in this role the ability to close form instances or change the permissions on the instance.
- **Manage Form Types:** Gives users in this role the ability to add, remove or modify fields on form types.
- **Import:** Gives users in this role the ability to import form instance details.

### Funding

- **View Funding:** Gives users the ability to see funding sources under the Project Cost.
- **Add/ Edit Funding:** Gives users the ability to add a new funding source and complete deposits against the source.

### Planning

- **View Capital Plan:** Gives users in this role the ability to view capital plans. In some cases, there may be someone responsible for managing capital plan and another responsible for scenarios.
- **Modify Capital Plan:** Gives users in this role the ability to add/ edit capital plans.
- **View Planning Scenarios:** Gives users the ability to view planning scenarios. In some cases, there may be someone responsible for managing capital plan and another responsible for scenarios.
- **Modify Planning Scenarios:** Gives users in this role the ability to add/edit planning scenarios.
- **Manage Templates:** Gives users in this role the ability to manage planning templates.

### Processes



- **Manage Processes:** Gives users in this role the ability to update process types without being an account administrator.
- **Manage Workflow:** Gives users the ability to manage process instances, which includes the right to override steps, update and take action on steps of the projects they have access to.
- **Import:** Gives users in this role the ability to import process instance details.

## Projects

- **Manage Private Notes:** Gives users the ability to view and add private project notes via the Project Details page - Notes tab.
- **Add New Project:** Gives users in this role the ability to add new projects and apply project templates. Account administrators might choose this as an alternative to giving certain roles/ users full administrative rights.
- **Update Project Details:** Gives users the ability to update project details, such as project name, the project administrator, address, project start and end dates, and project custom fields.
- **Manage Project Level Field Options:** Gives users the ability to manage project-level field options.

## Schedule

- **View Schedule:** Gives users or roles the ability to view the Schedule module from the Project Menu, and to run reports on schedule information. Note that this permission will be available only for accounts with the Current schedule enabled. Accounts that still utilize the Classic Schedule interface will not have this permission in the Setup module.
- **Manage Schedule:** Gives users the ability to add tasks and manage the schedule. For more information, see Manage Schedule Tasks.

**Note:** When the Manage Schedule permission is enabled, the View Schedule permission will also be enabled by default. If the View Schedule permission is disabled, the Manage Schedule Permission will also be disabled by default. However, changes to this permission will not cause any changes in the Manage Baselines permissions.

- **Manage Baselines:** Gives users in this role the ability to overwrite the baseline after it has been created and saved. This permission will most likely be restricted so that Project Managers are not re-saving the baseline.

## Submittals

- **View Submittals:** Gives users the ability to view submittal items.
- **Add/Edit Submittals:** Gives users the ability to add and edit submittal items. This permission should be given to contractors, as they will need to add, edit and send submittal items for review.
- **Create Submittals:** Gives users the ability to create submittal items but not send them for review. This is intended for subcontractors who submit items to a general contractor.
- **Manage Project Level Settings:** Gives users the ability to manage submittal settings at the project-level.

## Time Tracking

- **Create Time Sheets:** Gives users the ability to create and submit time sheets. Please be aware that if users are submitting time for billable activities, bill rates must also be set for these particular activities to be enabled on the time sheet. For instructions, see [Manage Account Bill Rates](#).
- **Manage Workflow:** Gives users in this role the ability to create, edit and delete workflows. The role must be an account admin role in order to receive this permission. Workflows are required to route submitted time sheets to the appropriate parties. For more information, see [About Workflows](#).
- **Manage Account Bill Rates:** Gives users in this role the ability to manage account bill rates. Bill rates are required for billable activities. Users with this permission are able to set hourly rates per user. You can set a default rate at the account level and also specify rates for particular projects in the event they differ from project to project. Rates must be set in order for users to view billable activities on their time sheets. For more information, see [Manage Account Bill Rates](#).
- **Manage Project Bill Rates:** Gives users in this role the ability to manage project bill rates. Although rates can be set at the account level, they can also be modified at the project level. Changes made on either page are reconciled and updated simultaneously. For instructions, see [Manage Project Bill Rates](#).
- **View Payout:** Gives users in this role the ability to view the payout amount on their time sheet, which includes their bill rate. Without this permission, users will only see the total amount of time entered per project and activity. For more information, see [Your Time Sheet Page Overview](#).

## Sent Items Page

The Sent Items page allows account and project administrators to view all outbound messages sent by project participants. Viewing sent items gives you access to the following sets of information:

- Subject of the message
- Date sent
- Recipient(s)
- Sender
- Delivery address
- Message status
- Number of times the message was opened

For instructions on viewing sent messages, see [View Sent Messages](#).

## Fields and Buttons

The fields and buttons located on the Sent Items page are:

- **Cancel:** Click to cancel the search and return to previously accessed page.
- **Project:** Displays the name of the project you are in.
- **Project Number:** Displays the project number, if available. Administrators have the ability to set project numbers by going to [Setup > Projects > Project Settings](#). For instructions, see [Create Project Number Custom Fields](#).

The fields and buttons in the Filter section are:

- **Show Failed Messages:** Select this check box to include only failed messages in the filter results.
- **Sent To:** You are able to search for a single user at a time. Enter the name of participant that messages were sent to.
- **Subject:** Enter the subject of the messages you want to filter by.
- **Date Sent Between:** To filter for messages sent with a certain time frame, enter the dates in these fields.
- **Body:** Enter a single keyword or phrase contained in the body of the message to filter by. Avoid the use of commas.
- **Filter:** Click to filter for entered criteria.
- **Reset:** Click to clear filter text fields.

The fields and buttons in the Messages section are:

- **Subject:** Displays the subject of the message. Click to open message details in a separate window.
- **Date Sent:** Displays the date and time the item was sent.
- **To:** Displays the Name, Email Address or Fax Number that the message was sent to. If the message was sent to multiple recipients, the word "Multiple" displays as a link for you to view a full list of the recipients and associated details.
- **Sent By:** Displays the name of the person that sent the message.
- **Delivery Address:** Displays the recipient's email address.
- **Status:** Displays the status of the message. Multiple statuses may be available if the message was sent to multiple recipients. If there are multiple statuses, the word "Multiple" displays as a link for you to view the details of additional statuses.
- **# Times Opened\*:** Displays the number of times the message was opened. This number may be unreported if the recipient email client blocks images. If the message was sent to multiple people, the word "Multiple" displays as a link for you to view details.

## Project Level Options

The Project Level Options page allows administrators and users to set project level options for projects that have a Drop Down, Multiple Pick, Radio Button or a Checkbox data type selected. This is available for custom fields and Process Data Fields only. When configuring a field of one of these types, you will now have the ability to set the options at the:

- Account Level
- Project Level: Options can be different project by project

## Fields and Buttons

The fields and buttons located on this page are:

- **Configure By:** Select configuration by field or option type
- **Fields:** Make a selection between custom fields or process data fields
- **Options:** Unselected lists all options configured for this project, not selected for this field