



e-Builder User Guide

August 2023

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Basics

To learn about e-Builder, review the basics on terminology, best practices and how to use the online help.

Note: Administrators have the ability to change color schemes to match their organization's branding. The screenshots in this manual show different color schemes, but the layout and tab locations are consistent.

Terminology and Naming Conventions

This topic provides an overview of the organization, icons, symbols, typographical conventions, and terminology used in the e-Builder Online User Assistance file, to assist you in locating information and answers to questions.

Terminology

Bidder versus Contact: In the real world, a contact can be a bidder or another type of vendor (such as a manufacturer or supplier), a client of a bidder (such as an owner), or a consultant (such as an architect, engineer, program manager, construction manager, etc.). However, in e-Builder, a bidder is stored as a contact, so throughout the Online User Assistance file you may see the terms bidder and contact used interchangeably.

Contents and Organization

The e-Builder Help system has multiple chapters, each of which represents a manual for one module or section of the software.

Hyperlinks

A user will also encounter standard hyperlinks throughout the help guide. A hyperlink is indicated by blue, underlined text. A user may click a hyperlink in order to navigate to a separate help topic (or to bring up a popup topic) containing information about that item.

Notes, Tips, and Warnings

Note: Notes contain important or supplemental information pertaining to the associated operation.

Tip

Tips contain useful hints, suggestions, or shortcuts pertaining to the associated operation.

Warning: Warnings contain critical information of which the user or administrator should be aware before proceeding with the operation. Typically, warnings indicate that unrecoverable loss of data will occur if you proceed, or that there could be damage to your system should you proceed and fail to perform the steps correctly. Always exercise extreme caution with procedures for which there is a warning.

Keyboard Shortcuts

When keys are to be pressed in combination, you'll see them connected by a plus sign (+). For example: Alt+F means press and hold the Alt key while pressing the F key.

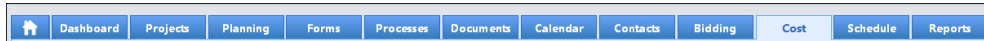
When keys are to be pressed in sequence, you'll see them connected by a comma (,). For example: Alt,F means press and release Alt and then press and release the F key.

Menus

When referring to a menu selection, each level of the menu is separated by a >. For example the Project Details page > Notes tab.

Tabs

Each vertical tabs represents a module. Example:



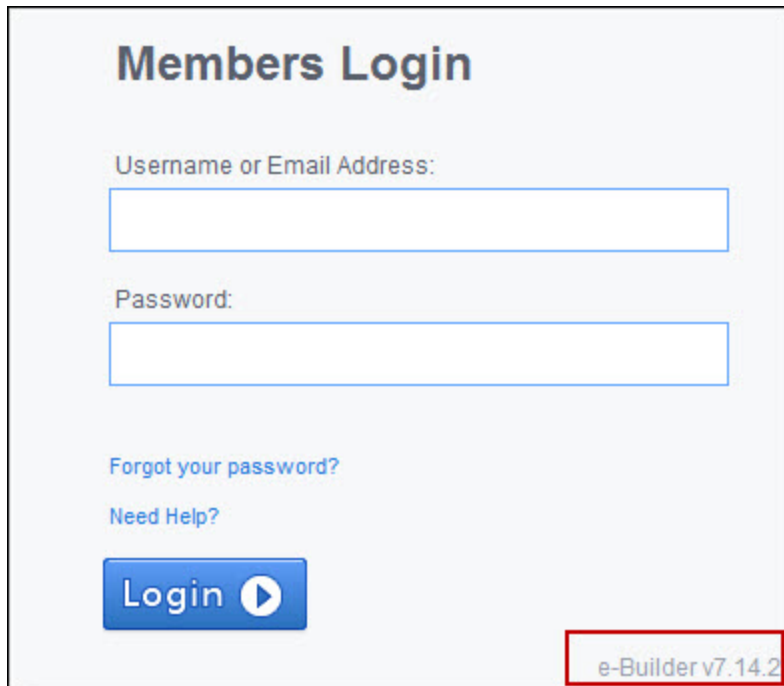
The highlighted module is the Cost module.

Pages

When talking about content within a module we will refer to each page as a screen or page (i.e. the Project Cost Summary page).

Viewing the Version Number

On the e-Builder software web site, after you click Client Login, the e-Builder version is displayed right beneath the Login fields. To submit any question to e-Builder Support, or to submit feedback regarding the Online User Assistance file, be sure to indicate the software version. Example:



All Other Conventions

All other naming conventions are those set forth in the Microsoft Manual of Style for Technical Publications, Second Edition, ©2004, Microsoft Press.

To help us better serve our customers, please report any errors, omissions, broken links, or general comments pertaining to this help guide to our documentation department.

Login Using Multi-Factor Authentication

Multi-Factor Authentication (MFA) is a more secure login process that combines validating two or more independent credentials before we allow the user to access e-Builder. Our current login process requires the user to enter only a password (something they know) while MFA requires an additional security layer. The typical approaches for MFA include the user to also provide “something they have” (security token or code) or “something they are” (biometric verification).

The goal of MFA is to create a layered defense and make it more difficult for an unauthorized person to access a target such as a physical location, computing device, network or database. If one factor is compromised or broken, the attacker still has at least one more barrier to breach before successfully breaking into the target.

Important: e-Builder strongly recommends that users utilize a separate mobile device (phone, tablet) with an authentication app as the second MFA step. This separation provides the best protection for the user's credentials. Browser based authentication apps or extensions are not supported.

Setting up multi-factor authentication for the first time

Important: Multi-factor authentication must first be enabled for your account. For more information, see [Multi-Factor Authentication](#).

If MFA has been enabled for your account, you will receive an email notification asking you to log in and complete the 2-step verification setup process.

You will need to install an authentication app on your mobile device. For a list of apps that have been tested by e-Builder to work with our current login sequence, go to the Login Hub and view the FAQ "How do I login to e-Builder using Multi-Factor Authentication (MFA)?".

To set up multi-factor authentication (MFA)

1. Click **Login** in the email that you received from e-Builder.
[New Users only \(If you are an existing user, skip steps 2-5\)](#)
2. Click **Agree** to accept all terms. The Profile page is displayed.
3. Enter all the required profile information (marked with an *) and click **Save**.
4. Enter the following required details to reset the password for your account:
 - **Current/ temporary***: The temporary password provided to you for your account.
 - **New***: The new password you wish to set for your account.
 - **Confirm***: Re-enter the new password you wish to set.
 - **Security questions***: Select the security questions / answers for your account.

Note: You will be asked these security questions when you need to reset your password.
5. Click **Save**.
6. In the 2- step verification page. enter the verification code sent to your registered email address and click **Verify**.

Note: This one-time verification code expires in 10 minutes. If you didn't get the verification email, click **Didn't get a verification code?** and then click **resend the code** to get a new code sent to your email address.

- a. Click **Verify**. The Get authenticator app section is displayed.
- b. Follow the onscreen instructions to select an authenticator app to install on your mobile device.
- c. In the authenticator app on your phone, scan the QR code to add the token.

Tip: If you cannot scan the QR code, click **Can't scan it?** to view instructions on how to manually add the account by entering the 16-digit verification code displayed onscreen.

Note: To set up the browser authenticator instead, click **Can't scan it?** and copy the verification code provided.

- d. Click **Done**. The authenticator app will generate a 6-digit code.

Tip: In the authentication app, the code will be displayed in blue as long as it is valid (30 seconds). After a code expires, it will be displayed in red. e-Builder accepts the current and previous code.

- e. Enter the authenticator app-generated code in the **Verification code** field.
- f. Click **Save**. A registration confirmation message is displayed.
- g. Click **Continue to e-Builder** to complete the login process. The e-Builder homepage is displayed.

Subsequent Logins Using the Authenticator App

After you setup your account to use the authenticator app, you will need to keep the app accessible during future login attempts.

On subsequent logins, you will only need to enter a code generated by the authentication app.

To login to e-Builder using multi-factor authentication (MFA) after registering

1. On the e-Builder Member Login page, enter your username and password.
2. Click **Log In**. The 2-step verification page is displayed.
3. Open the authenticator app and view the 6-digit verification code generated in it.
4. Enter the authenticator app-generated code in the **Enter verification code** field.
5. Click **Verify** to complete the login process. The e-Builder homepage is displayed.

Single Sign On (SSO)

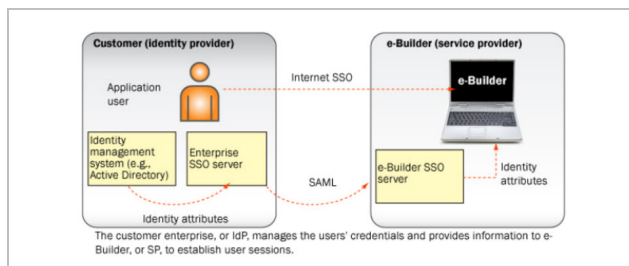
Fully Integrated with e-Builder Enterprise

e-Builder Enterprise integrates the industry's most trusted capital program management software with enterprise e-Builder Single Sign On (SSO) capabilities. Our SSO solution leverages federated identity standards to allow users to securely access e-Builder without requiring multiple logins, and without having to manage separate application passwords. Your staff will maintain secure, direct access to external resources like e-Builder

using your existing protocols. You can then maintain reduced operational costs by providing centralized management of all application connections, leveraging reusable connection configurations, and integrating easily with existing identity infrastructure and target application environments.

Benefits:

- Higher user adoption rates
- Fewer help desk tickets and lower associated costs
- Lower administrative overhead
- Increased productivity
- Strengthened security
- Increased compliance audit pass rates



Single Sign On

Standards-based Single Sign On

e-Builder supports federated identity standards such as Security Assertion Markup Language (SAML) and WS-Federation which allow organizations to share credentials and attributes for authentication and authorization, and reduce security gaps by creating a trusted connection to e-Builder Single Sign On (SSO)

Note: We support all vendors who are compatible with standard SAML 2.0 connections.

It is also available for StateRAMP and FedRAMP. Additionally, if a customer has multiple instances (Commercial and FedRAMP), SSO will work for both.

For Browser-only SSO, there can be multiple connections set up (Max limit of 4).

If you have any questions about limitations with multiple setups, please contact your e-Builder Account Manager or Customer Success Manager.

Process Overview

With secure Internet SSO, once a user has logged into your enterprise network, they can directly access e-Builder over the Internet. Hidden from the user, your federated identity software validates their login credential and assembles a specially formatted software message called a SAML assertion that contains information about the user. This assertion is transmitted to the e-Builder SSO server over the Internet via a trusted connection established as part of the SSO service setup process. e-Builder then reads the information in the assertion and uses it to give the user access to their e-Builder account without requiring additional user names, passwords, or any other login mechanism. In order to securely transfer information about the user, the Identity

Provider (you) and the Service Provider (e-Builder) must first agree on what details about the user will be passed. This is known as the attribute contract. For e-Builder SSO, all that is needed is the user's email address. To support express user provisioning, additional attributes are required in order to add the new user to e-Builder.



Single Sign On Process

When the attribute contract is established, each party knows what will be passed. The user logs into your enterprise domain and is authenticated internally. When a user requests access to e-Builder, their browser automatically redirects to your enterprise SSO server, which then builds SAML assertion that includes information in the attribute contract.

This information is put into the browser header and their browser is redirected to the e-Builder SSO server using a secure HTTPS post. The e-Builder SSO server retrieves the assertion from the browser header, decrypts it, validates the credentials, and logs the user into e-Builder. The user is given access to e-Builder without the need to directly log in.

The entire process happens so quickly that the user does not notice the extra redirects have even occurred.

System Requirements

Use of e-Builder User Guide can be easily achieved with a computer and a broadband internet connection. Performance is typically driven from the speed of your internet connection as we are a web-based product versus your computer hardware specifications. However, there is a recommended base minimum desktop standard to maintain optimal performance:

Operating systems:

- Windows 7 or later
- OSX v10.8 or later

Supported client browsers: (* recommended for optimal performance)

- Microsoft Edge 91 or later
- Google Chrome* 99 or later
- Mozilla Firefox* 91 or later
- Safari 14 or later

Note: The Safari browser has a built-in popup blocker that should be disabled for all e-Builder sites. Otherwise, links to Form and Process instances will not open the instance window directly. You will have to double-click to navigate to these instances.

Other browsers: (e-Builder User Guide is available on these browsers but some features might not work as expected)

- Google Chrome for iOS
- Google Chrome for Android

Note: e-Builder support for the Microsoft Internet Explorer (IE) browser will end 15 June 2022.

Screen Resolution:

The recommended screen resolution is 1280 x 1024 or higher. The minimum screen resolution required to support all e-Builder features is 1024 x 768. Lower screen resolutions do not always accurately display features such as Reports and Page Layouts.

Pop-up Blocker:

Ensure that you allow pop-ups from e-Builder in your browser.

Use e-Builder Search

e-Builder's global Search functionality helps you find documents, contact information, forms, processes or other data using one or more search criteria.

By default, performing a search will do the following:

- Prioritize the words from left to right .
- Search through the custom field values, notes and descriptions where applicable.
- Search the contents of certain file types uploaded to the Documents module (including PDFs). File types listed below as excluded from Optical Character Recognition (OCR) will not be searchable for internal content.

File formats that are excluded from Optical Character Recognition (OCR)

Audio Formats:

- CDA
- MID
- MP3
- MPA
- WAV
- MWA

Video Formats:

- 3g2
- 3gp
- AVI
- H264

- H265
- M4V
- MKV
- MOV
- MP4
- MP2
- MPG
- MPEG
- WMV
- FLV

Compressed Formats:

- ZIP
- Z
- RAR
- 7Z
- TAR
- GZ
- KMZ

Image Formats:

- JPEG
- JPG
- PNG
- GIF
- TIFF
- TIF
- PSD
- RAW
- BMP
- EPS

- WEBP
- JFIF

Other Formats:

- BAX (Bluebeam XML Markup)

To perform a global search

1. Click the search button on the top bar. The Search Results page is displayed with a Search Options area.
2. In the **Search For** field, enter the search term(s). This field is required.
3. From the **Limit Search To** drop-down list, select a project to search in.

Tip: Click **Clear** to remove the selected project.

4. In the **Search In** field, select one or more areas to specify the types of information to search in.

Tip: You must specify at least one type of information to search in. Click **Select All** to select all the check boxes and specify the search areas.

—Or—

Click **Deselect All** to clear all the check boxes.

5. Click **Continue Search**. The search results, if any, are displayed in the search results grid. If no results are found in certain search criteria, a notification message is displayed.

Tip: To re-do the same search with different search filters, update the search criteria and then click **Refine Search**.

To filter the results

In the search results section, filter the search results by entering the filter criteria in the Search box under each column name. You can enter filter criteria in more than one column at a time. Only the results that match the filter will be displayed.

Documents (6)

Project	Folder	File Name	Description	Version
Search	Search	Plan	Search	Search
Pine Grove Medical Office Building	Documents \ 20 Bidding \ 21 Solicitation \ Drawings	A-205 Floor Plan Blanche.jpeg		1
Susan's Classy Clubhouse	Documents \ 20 Bidding \ 21 Solicitation	A-206 Ross Floor Plan.jpg		1
Susan's Classy Clubhouse	Documents \ 20 Bidding \ 21 Solicitation	A-107 Stevens Floor Plan.jpg		1
Pine Grove Medical Office Building	Documents \ 20 Bidding \ 21 Solicitation \ Drawings	A-107 Stevens Floor Plan.jpg		1
Susan's Classy Clubhouse	Documents \ 20 Bidding \ 21 Solicitation	A-205 Floor Plan Blanche.jpeg		1
Pine Grove Medical Office Building	Documents \ 20 Bidding \ 21 Solicitation \ Drawings	A-206 Ross Floor Plan.jpg		1

To sort the results

In the search results section, sort the search results by clicking the name of a column.

Documents (7)

Project ↕	Folder ↕	File Name ↕	Description ↕	Version ↕
Search	Search	Search	Search	Search
Susan's Classy Clubhouse	Documents \ 20 Bidding \ 21 Solicitation	A-107 Stevens Floor Plan.jpg		1
Pine Grove Medical Office Building	Documents \ 20 Bidding \ 21 Solicitation \ Drawings	A-107 Stevens Floor Plan.jpg		1
Susan's Classy Clubhouse	Documents \ 20 Bidding \ 21 Solicitation	A-205 Floor Plan Blanche.jpeg		1
Pine Grove Medical Office Building	Documents \ 20 Bidding \ 21 Solicitation \ Drawings	A-205 Floor Plan Blanche.jpeg		1
Susan's Classy Clubhouse	Documents \ 20 Bidding \ 21 Solicitation	A-206 Ross Floor Plan.jpg		1
Pine Grove Medical Office Building	Documents \ 20 Bidding \ 21 Solicitation \ Drawings	A-206 Ross Floor Plan.jpg		1
Susan's Classy Clubhouse	Documents \ 20 Bidding \ 21 Solicitation \ Specifications	Submittal Register Example.xls		1

To export the results

In the search results section, click **Explore All Data** to export all the search results from a particular module to an MS Excel spreadsheet (.xlsx format).

Toolbar Buttons

Depending on your permission and the type of form/record, the following toolbar buttons may be available:

- **Print:** Prints the selected window.
- **Check Spelling:** Click to check the spelling of fields.
- **Cancel:** Click to discard changes. All unsaved data will be lost.
- **Save:** Saves any changes.
- **Close:** Closes the window.

File Uploads - Supported File Types

The following file types are permitted for use while performing File Uploads to e-Builder:

- aae (Edits made to an image using the Photos app on an iOS device)
- ACD (An ACD audio project file contains audio tracks, volume information, loops, and settings)
- ai (Native vector file type for Adobe Illustrator)
- atx (ArcGIS Attribute Index Format - developed by ESRI - GIS file)
- avi (Audio Video Interleave multimedia container format created by Microsoft)
- bak (A common file extension for the files that are created by the auto-save features found in many computer applications)
- bin (A file that stores data in a binary format)
- bmp (Windows Bitmap)
- caf (Used for a proprietary audio file format, which is also known as Apple Core Audio Format)
- cpg (Codeplug for Motorola 2-way radios)
- cr2 (Image file. Canon RAW)

- csv (Comma Separated Values)
- ctb (AutoCAD drawing - color based plot styles)
- dat (A generic data file that stores information specific to the application it refers to)
- dbf (dBASE)
- dgn (MicroStation/CAD format)
- doc (Microsoft Word)
- docm (Microsoft Word with macros)
- docx (Microsoft Word)
- dot (Microsoft Word template file)
- dotx (Microsoft Word template file)
- drw (Vector graphics file format for drawings)
- dtm (AutoCAD - utility for irregular triangular network)
- dwf (Autodesk Design Web Format)
- dwg (Autodesk AutoCAD Drawing (through version 2020))
- dwl (TurboCAD drawing lock file)
- dwl2 (AutoCAD drawing lock)
- dxf (Drawing Exchange Format or Drawing Interchange Format file)
- eml (Microsoft Email)
- eps (Encapsulated PostScript format - A vector file format required for professional and high-quality image printing)
- est (Construction Cost Estimate Files)
- fmp (AutoCAD Font Map)
- gfx (ASCII graphics file - define 3D polygonal models)
- gif (Graphics Interchange Format)
- gpj (Grapher drawing files)
- heic (The file format name Apple has chosen for the new HEIF (High Efficiency Image Format) Standard)
- HPS (Hewlett Packard header file for sending PDF)
- iam (Inventor Assembly Format - CAD files)
- ics (universal calendar format - Outlook)
- idw (Inventor design drawing - like CAD)
- INF (Setup Information file - a text file in a driver package that contains all of the information that device installation components use to install a driver package on a device.)
- ini (Config file for user preferences & OS)
- ipt (Autodesk)
- jfif (JPEG File Interchange Format)
- jpeg (Joint Photographic Expert Group image - A compressed Image)

- jpg (Joint Photographic Expert Group image - A compressed Image)
- kmz (Keyhole markup language ZIP -older Google Earth file)
- laz (ArcMap light detection data)
- lnk (Link to an executable file - Windows)
- log (A log used by various operating systems and programs)
- lst (Data list file)
- m4a (Mp4 audio file)
- mdb (MS Access and other database files)
- mdx (3D Image file)
- mer (Runtime file for Human Machine Interface apps)
- mht (Multipurpose Internet Mail Extension HTML file - an archiving file format)
- mov (MOV file is a movie file saved in the QuickTime File Format (QTFF))
- mp3 (Audio files developed by the Moving Picture Experts Group (MPEG) that uses Layer 3 audio compression)
- mp4 (Digital multimedia container format most commonly used to store video and audio)
- mpg (Moving Picture Experts Group video file)
- mpp (Microsoft Project)
- msg (Single Outlook message)
- MTS (Video - advanced video coding high def format)
- nef (Photo - Nikon RAW format proprietary)
- nwd (Navisworks 3D viewer - CAD)
- one (Microsoft OneNote)
- p7s (Email message files used in email management programs for sending, receiving or just simply viewing secure emails encrypted with digital signatures)
- pat (A CAD file which is used by AutoCAD software)
- pc3 (Plotter config file - for printing drawings)
- pdf (Adobe Portable Document Format)
- plt (AutoCAD - vector based plotter file)
- png (Portable Network Graphic)
- ppt (Microsoft Power Point)
- pptx (Microsoft PowerPoint 3)
- prj (GIS file - plain text describing coordinate system & projection info)
- prx (XML file used by multimedia programs - stores codecs for audio/video)
- pub (MS Publisher - for marketing publications)
- rfa (BIM data for Autodesk Revit)
- rpt (Report - usually Crystal Reports)
- rtf (Rich Text Format)

- rvt (Autodesk Revit 8 (2015 to 2020))
- rws (Revit workspace file)
- sbn (ArcGIS shape info file)
- sbx (ArcGIS shape info index file)
- shp (ArcGIS -shape file for topology)
- sht (A The Works! Spreadsheet file)
- shx (Autodesk)
- sid (A raster image file that uses the multi-resolution Seamless Image Database compression method for compressing large raster image files)
- SOR (Adobe Flash Media Server Client Side Shared Object)
- spx (digital audio file, a speech recording encoded with the Speex code)
- svg (Graphics - scalable vector)
- tif (Tagged Image File)
- tiff (Tagged Image File)
- tin (GIS - triangulated irregular networks)
- ttf (.ttf file extension are most commonly associated with font files. The TTF file format was created by Apple)
- txt (Text)
- url (Shortcut for web browsers)
- vcf (A .VCF file is a vCard - Virtual Contact file)
- vsd (Microsoft Visio Drawing file)
- vsdx (Microsoft Visio)
- wdp (AutoCAD Electrical)
- wmv (Windows media video - video codecs)
- xer (Primavera Project Plan file)
- xls (Microsoft Excel)
- xlsb (Microsoft Excel)
- xlsx (Microsoft Excel Macro-enabled)
- xlsm (Microsoft Excel)
- xlt (Microsoft Excel Template)
- xltx (MS Excel Template - open XML)
- xml (Extensible Markup Language)
- zip (Archive that contains one or more files compressed or "zipped")

Best Practice Guides

Our best practice guides allow you to leverage e-Builder to implement many different industry standard techniques to ensure the success of your projects and overall capital program. Below are links to available best practice guides.

- Risk Management Best Practice Guide
- Payment Application Best Practice Guide

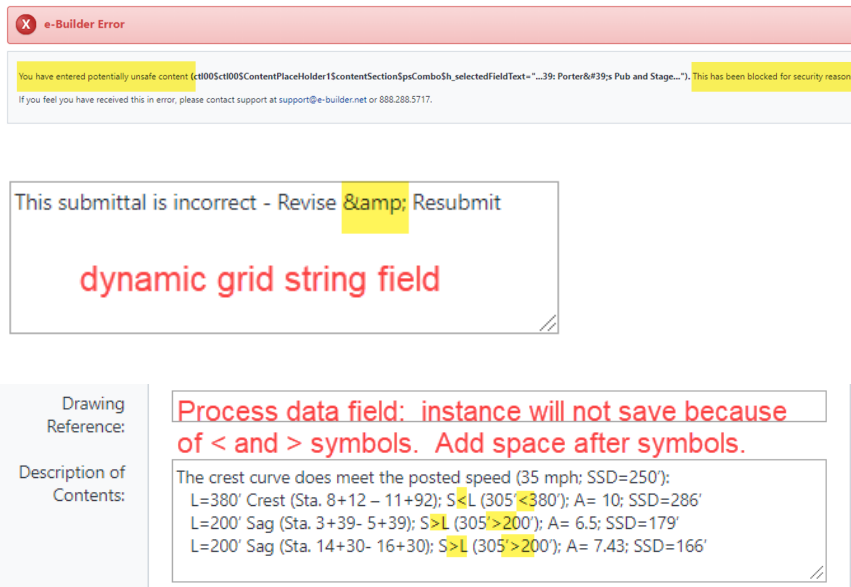
Known Limitations

The following issues are acknowledged limitations of the e-Builder program that are unlikely to be fully resolved in the near term:

Illegal characters in text fields – “potentially unsafe content” error:

Text fields across the product allow entry of certain symbols that are typically used in programming code. While some fields may have no problem, other fields may trigger errors because these symbols can be indicators of malicious hacking.

The following errors may occur in process steps, on-screen display of the field, or mail merges / exports:



To workaround these limitations:

- & (ampersand) - spell out as “and”
- > or < - add a space after each symbol
- % - spell out as “percent”
- "" (double quotes) – remove
- # - remove

Contact e-Builder Support

Email: support@e-Builder.net

Toll-free number: 888-288-5717 (U.S.)

Email: e-builder-gov-support@trimble.com

Toll-free number: 866-254-1531

To learn more about our support services, visit www.e-builder.net/services/support.

My Home

My Home is a customizable central location where you can quickly view, prioritize and navigate to the top items that you need to handle each day. My Home includes the following features:

- Customizable interface for individual users to highlight the information that is most important to each user.
- Customizable widgets that you can select and enable or disable from your personal My Home page. You can also reposition these widgets as needed.
- Personalized sorting, filtering and column selection in grids.
- All other information is simplified to reduce visual clutter and conform to corporate graphical standards.

Customize the My Home Page

To customize the display of widgets on My Home, click the **Edit My Home** button. A list of available widgets will be displayed on the right panel. You can click the Edit My Home button or the close button to exit Edit mode.

Note: All widgets are enabled by default for all users based on their account settings and their individual user permissions.

Tip: To view all pages of items, click the **Next** or **Previous** buttons or any page number. To sort a column, click on its header.

To enable a widget

1. Go to the **My Home** page.
2. Click the **Edit My Home** button. The right panel is displayed with a list of widgets available on the main panel and the left side panel.
3. To enable the display for a widget, click the toggle beside it.
4. To close edit mode, click the **Edit My Home** button again or click the close button **X** on the right panel.

To disable a widget

1. Go to the **My Home** page.
2. Click the **Edit My Home** button. The right panel is displayed with a list of widgets available on the main panel and the left side panel.
3. To disable the display for a widget, click the toggle beside it.
4. To close edit mode, click the **Edit My Home** button again or click the close button **X** on the right panel.

To change the position of a widget

1. Go to the **My Home** page.
2. To reposition a widget, click the **Edit My Home** button.

3. Drag and drop the widget from current position on screen to the desired position.
4. To close edit mode, click the **Edit My Home** button again or click the close button **X** on the right panel.

Sections of the My Home page

My Home is divided into the following panels or sections:

Note: In order to view the My Home page items that have been assigned to an Administrator, the Administrator must also be a member of that project. (This does not affect functionality or access to the instances for Admins in other modules like Processes or Forms.)

Left Panel

This area on the left side of the Home page includes the following cards or widgets:

- **Logo:** Displays the logo image for your company. The name of the account that you are currently accessing will be displayed as a tooltip when you hover over the logo. Note that this card cannot be edited, repositioned or disabled from the Edit My Home panel.
- **Announcements:** Displays information on how you can contact e-Builder Support. This card can be relocated within the left panel but cannot be edited or disabled from the Edit My Home panel.
- **Events:** This widget displays the top 5 upcoming calendar events across all of your projects. Click **View more** to view the main Calendar page. Click the name of an event to view the Event Details page for it.
- **Quick Add:** This widget displays the 5 most recent object types you have used and allows you to easily add any form or process instance. Click **View more** to view the Quick Start window.
- **Recent Pages:** This widget displays the top 5 pages you visited recently.

Main Panel

The center area of the Home page includes the following widgets that can be enabled/ disabled and repositioned:

- **My Processes:** This table includes process instances that require you to take an action or comment on.
- **My Forms:** This table includes forms that require you to take an action or comment on.
- **My Time Sheets:** This table includes the employee time sheets within the Time Tracking module that are currently in your court.
- **My Items Pending Approval:** This table includes cost items that are awaiting your approval. This grid can now be sorted by clicking the Controlling Process column header.
- **My Schedule Tasks:** This table includes all tasks that require your attention. If you receive notifications when tasks reach a certain level of completion, these tasks will display in your court as well. Note that if your account uses Resource Management, this widget will be blank by default.
- **My Submittals:** This table includes Submittal items that are currently in your court. This widget has a pre-set grid filter for Action Required and Forwarded states.

- **My Quarantined Spam:** This table includes the items that have been identified as spam and quarantined. Click the title of each item to either accept or reject items as spam.

Right Panel

Click the **Edit My Home** button to access the Edit My Home panel with all the widgets available on the My Home page.

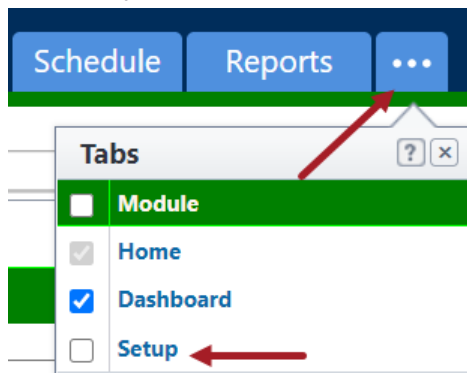
About My Settings

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

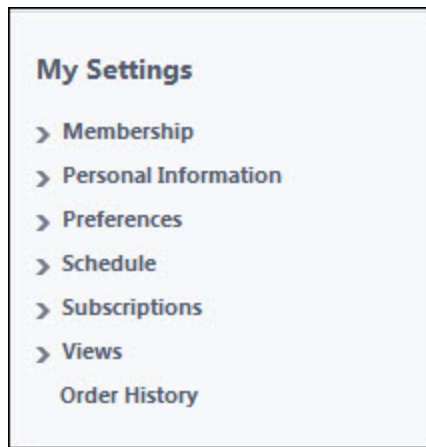
To access My Settings

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

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



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



About Membership Settings

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

To access the Membership Settings page

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

Project Membership Page

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

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

For instructions, see Import Projects.

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

Role Membership Page

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

Your Account Level Role Membership

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

Your Project Level Role Membership

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

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

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

Update My Profile

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

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

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

To update your profile

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

Change my Password

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

A valid password must meet the following criteria:

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

- Cannot be a recently used password
- Cannot be a common password

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

To change your account password

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

About Access Delegation

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

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

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

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

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

To access the Access Delegation page

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

Grant Someone Access to My Profile

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

To grant a colleague access to your profile

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

Tip

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

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

Request Access to Someone's Profile

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

To request access to a colleague's profile

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

Tip

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

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

Access Delegation Page

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

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

To access the Access Delegation page

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

Fields and Buttons

The fields and buttons located on this page are:

Access Delegation Management Tab

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

Filter Delegations

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

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

Delegation Table

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

- **Select User** - Select the user whose profile you wish access. Filter by roles to narrow down the list of users or select from the list of all available users.
- **Access Duration** - Select the time frame for which you need to have access to the user's profile.
- **Notes** - Enter any necessary notes for this delegation that the user will be able to see.
- **Check Spelling**: Click to check the spelling in the notes before sending.
- **Grant**: Only displays when access is being granted. Click to grant access to your account.
- **Request**: Only displays when access is being requested. Click to request access to someone's account.
- **Clear**: Click to clear all completed fields.

Access Delegation History

This tab provides a log of all access delegation transactions.

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

About Preferences Settings

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

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

To access the Preferences settings

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

Access Notification Settings Page

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

To access personal notification settings

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

For more information, see Notification Settings and Summary Notifications.

Notifications Settings Tab

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

To edit notification settings

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

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

General

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

Calendar

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

Documents

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

Forms

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

Summary Notifications

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

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

To access Summary Notifications

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

Create Personal Summary Notifications

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

To create personal summary notifications

1. Go to the Summary Notifications tab.
2. Click **Create**.
3. If an account admin has made templates available, the **Template** field is displayed with the option to create a summary notification based on a predefined template.
4. Enter a subject for the summary in the **Subject** field.
5. In the **Module(s)** field, choose the modules from which to summarize notifications.

A list of specific notifications for the selected module(s) appears in a table below.

Note: If an account administrator made a template available for general use, it will appear as an optional selection.

6. Click the **Send Daily Summary at** drop-down menu to choose a delivery time for your summary notification.
7. Select the check box next to the specific notifications you wish to include in the summary.
8. Click **Save**.

Edit Personal Summary Notifications

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

To modify personal summary notifications

1. Go to the Summary Notifications tab.
2. Click the **Edit** link beside the notification name.
The Edit Summary Notification page is displayed.
3. Update the details of the notification:
 - Modify the subject
 - Add or remove modules

Note: When modules are removed, instant notifications will be received as if the summary notification was never created.
 - Update the delivery time
 - Update the recipients
 - Update the items included in the notification by selecting or clearing the appropriate check boxes.
4. Click **Save**.

Delete / Disable Personal Summary Notifications

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

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

To delete or disable personal summary notifications

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

Note: When this feature is disabled, instant notifications will be received as if the summary notification was never created.
3. To remove the notification, click the **Delete** link.
You are prompted for confirmation.
4. Click **OK** to confirm the changes

Interface Settings Page Overview

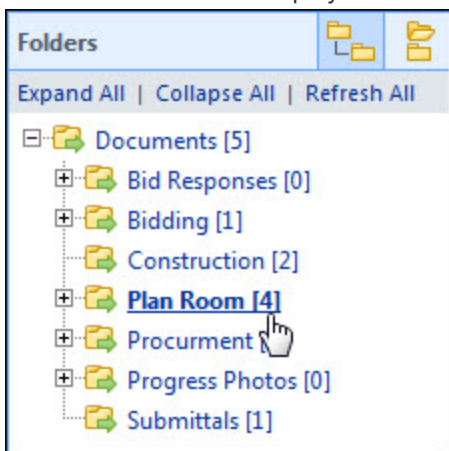
The Interface Settings page allows you to customize different aspects of the e-Builder Enterprise interface.

To access the interface settings

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

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

- **Font Size:** Select a preferred font size. This setting affects body text only, not buttons or the options in the Project Menu. The default selection is Small (12px). The text on the page dynamically adjusts as you switch between these options so you can preview each font option before committing to the change.
- **Display Density:** Select an option to determine the amount of white space that appears between each row of information. You can choose to have a **Compact**, **Comfortable** or **Relaxed** display density. The default selection is **Relaxed**. The display density dynamically adjusts as you switch between these options so you can preview each one before committing to the change.
- **Default Tab:** Click this drop-down arrow to select the module that displays by default after you login to e-Builder Enterprise. You can set your preferred module or one that you often access first as the default tab. The Home tab is the default selection in this field and it allows you to view all items in your court easily.
- **Default Project:** If you have a default tab selected in the setting above, then choosing a default project here will automatically open your default module to the project you select in this setting, with the exception of the Home tab.
- **Default Documents Sort Order:** Click this drop-down arrow to select the default order in which documents are listed in the system. You can choose to sort documents by File Name, Date Created, Owner or Company. You can further customize sort order in ascending or descending order.
- **Default Files Per Page:** Click this drop-down arrow to select a default number of files to display per page.
- **Expand All Folders By Default:** Select this check box to have folders automatically expanded when a page loads.
- **Include Subfolder Files In Folder File Count:** Select this check box to include files in subfolders in the total file count that displays in the Documents Folders Pane.



- **Default Forms Sort Order:** Click this drop-down arrow to select the default order in which forms are listed in the system. You can choose to sort forms by Subject, Prefix, Number, Author, Held By, Due Date or Status. You can further customize sort order in ascending or descending order.

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

Manage Users

eB Construction

Available Users

Filter Users

Last Name ▼ starts with ▼

Select a custom field ▼ Select a value ▼

[Filter](#)

Edwards, Shakyma -- sedwards -- eb
Jones, Deborah -- DJones -- Construction Depot
Sylverne, Zenarie -- Zazoo -- Clody's Construction
Waters, Abigail -- Abigail -- Construction Depot
Waters, Abigail -- AWaters -- ABC Construction

>

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

Manage Users

eB Construction

Available Users

Filter Users

Last Name starts with

Select a custom field Select a value

[Filter](#)

- Edwards, Shakyma -- sedwards -- eb
- Jones, Deborah -- DJones -- Construction Depot
- Sylverne, Zenarie -- Zazoo -- Clody's Construction ←
- Waterrs, Abigail -- Abigail -- Construction Depot
- Waters, Abigail -- AWaters -- ABC Construction

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

Lookup (Select users/contacts to add below)

Filter Users/Contacts Users Only

First Name:

Last Name:

Username:

Company:

Project Contacts Only: ←

User Custom Fields:

Contact Custom Fields:

[Filter](#)

- **Hide Calendar on Home Tab:** Select to hide the calendar on the Home tab. This tab is visible by default, but can be hidden to allow the page to load more quickly or to increase screen real estate.

Schedule Templates

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

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

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

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

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

To access the Admin Schedule Template page

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

The Schedule Templates page is displayed.

To access My Schedule Templates page

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

The My Schedule Templates page is displayed.

Add a schedule template

Administrators or users with manage schedule permission can add schedule templates

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

To add a new schedule template

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

Delete a schedule template

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

Tip

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

To delete a schedule

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

Working with Schedule Templates

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

To access the Admin Schedule Template page

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

The Schedule Templates page is displayed.

To access My Schedule Templates page

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

The My Schedule Templates page is displayed.

To access the Schedule Template Details page

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

Tasks toolbar

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

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

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

Edit the details of a schedule template

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

Add tasks manually to a schedule template

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

[To add tasks manually](#)

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

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

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

Add tasks using an import file

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

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

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

To import tasks

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



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

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

Move tasks within the schedule template

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

To move tasks within the schedule template

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

Manage Calendars

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

To add new calendars

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

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

To edit the working time

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

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

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

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

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

Copy schedule templates

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

About Subscriptions

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

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

Document Subscriptions

- Document Subscriptions
- Add and Edit Document or Folder Subscriptions

Report Subscriptions

- Report Subscriptions

Document Subscriptions

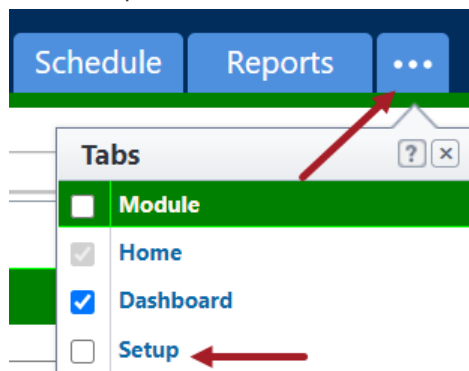
Document subscriptions are added in the Documents module, but can be managed from the Document Subscriptions page at any time. Subscription management allows you to delete subscriptions or change the subscription types from daily summaries or instant notifications.

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

To edit document subscriptions

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

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



The My Settings section is displayed on the left pane.

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

—Or—

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

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

Fields and buttons available on the Document Subscriptions page

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

Related Topics

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

Report Subscriptions


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

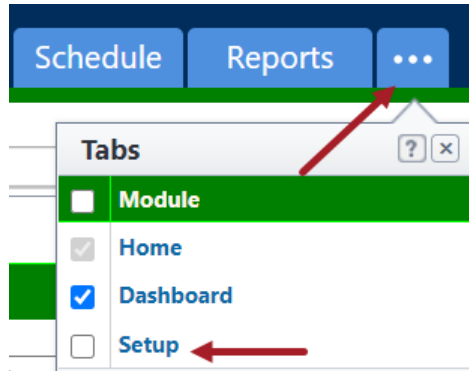
Note: Sometimes subscription reports would fail to execute due to configuration problems such as changed report permissions, invalid destination folders or due to invalid users. The report would continue to retry on each subscription period indefinitely and continue to fail consistently. To avoid this, e-Builder sets a limit on the number of retries made. Report subscriptions will retry immediately five times, and then for four more scheduled periods. If the report continues to fail, it will be marked disabled after the fifth scheduled attempt. An email notification will be sent to the subscribed user and administrators informing them that the subscription has been disabled.

Access Report Subscriptions

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

To access subscription reports

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



The My Settings section is displayed on the left pane.

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

Fields and buttons available on the Subscriptions - Reports page

- **Add Scheduled Report:** Click to add a scheduled report, which will allow you to receive existing reports on a scheduled basis. These subscriptions can be added by any licensed e-Builder user at any time.
- **Edit:** Click to modify the details of the subscription, such as the report type, subscription name, delivery method and frequency.
- **Delete:** Click to delete the report subscription. This will remove the subscription for the account all together.
- **Disable:** Click to disable the report subscription. Disabling allows you to temporarily suspend the subscription without removing it from the account all together.
- **Run Now:** Click to run the report and receive real time data.
- **Name:** Displays the name of the name of the subscription. Click the name to directly view the report in e-Builder.
- **Output Type:** Displays the output type. To make changes, go to step 1 of 4 of the Edit Scheduled Report wizard.
Options include:
 - **HTML:** This output type formats data in HTML - the standard formatting language used to create websites
 - **Excel Data Export:** This output type allows you to view and modify data in an Excel spreadsheet.
 - **Excel Print View:** This output type is a read-only Excel spreadsheet that cannot be modified.
 - **CSV Data Export:** This output type displays data in a table-structured, comma separated format.
 - **Tab Delimited Text:** This output type separates data using the tab character. This format supports exchanging and storing information in databases.
- **Schedule:** Displays the days and time the report is scheduled to run.
- **Next Run Time:** Displays the next time day and time the report is scheduled to run.

- **Last Run Time:** Displays the last date and time the report is scheduled to run.
- **Last Result Status:** Displays the status of the last report. Scheduled reports can either succeed or fail.
- **Delivery Type:** Displays the delivery method set for this scheduled report. To make changes, go to step 4 of 4 of the Edit Scheduled Report wizard.

More than one of following options may be selected:

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

Add a Report Subscription

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

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

To add a scheduled report subscription

1. Go to My Settings.
2. Click **Subscriptions**, and then **Reports**.
The Subscriptions - Reports page is displayed.
3. Click **Add Scheduled Reports**.

The Add Schedule Report page of the Schedule Report Wizard (Step 1 of 4) is displayed.

4. Complete all the required fields on each step of the Schedule Report Wizard.
Refer to the list of fields and buttons below for more information on each step of the Schedule Report Wizard.
5. Click **Next** to advance to the next step of the wizard.
6. Click **Save**.

Fields and buttons available on the Schedule Report Wizard pages

Required fields are marked with an *.

Step 1 of 4

- **Select a report to schedule***: Click the drop-down arrow to select an existing report to create the subscription for.
- **Select field to record the date for the following events**: The drop-down menu options are populated with either date-type custom fields or process/ form data fields depending upon the type of report selected to be scheduled. They allow you to include a start and completed time stamp for the scheduled report. / When the scheduled report starts processing, the first field is updated with the current system time stamp on every entity that is included in the report results. The second field gets populated with the current time stamp after the report is successfully delivered to its configured destination (email/ folder/ FTP).
- **Select an output type**: HTML is the default file output type, but you can choose from any of the following options:
 - **HTML**: This output type formats data in HTML - the standard formatting language used to create websites
 - **Excel Data Export**: This output type allows you to modified data in an Excel spreadsheet.
 - **Excel Print View**: This output type is an Excel spreadsheet that cannot be modified.
 - **CSV Data Export**: This output type displays data in a table-structured, comma separated format.
 - **Tab Delimited Text**: This output type separates data using the tab character. This format supports exchanging and storing information in databases.

Step 2 of 4

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

Step 3 of 4

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

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

Step 4 of 4

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

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

Edit Report Subscriptions

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

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

To edit report subscriptions

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

Related Topics

- About Subscriptions

About Views

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

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

Key Concepts of Views

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

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

The following concepts are used within e-Builder:

- **Project:** To begin the bid process you must first create a project. Each real world project that your organization is participating in must be associated with a project in e-Builder. Your Project Administrator or Manager will be able to add you as a member of a project in e-Builder if you are working on it.

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

Using Views in e-Builder

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

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

Example

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

Access Views

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

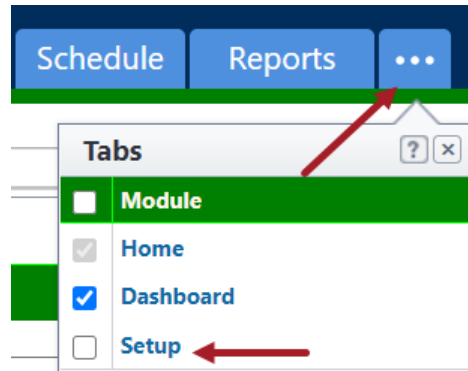
The Manage Views page allows you to modify or delete the personal views you've created. Every licensed e-Builder user is able to create personal views for the modules that they have access to. Views allow you to customize the data that is currently in view when you access a module from the top navigation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

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

To access the Manage Views page

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

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



The My Settings section is displayed on the left pane.

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

Available on the Manage Views page

Buttons and Fields

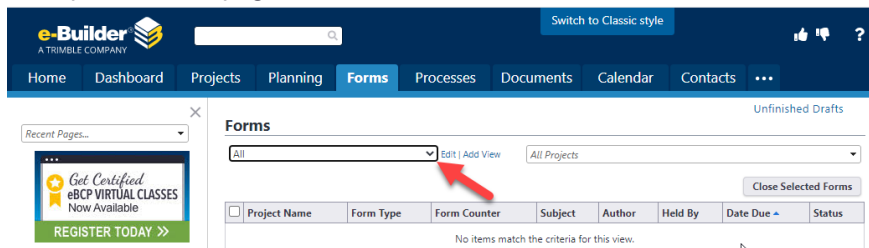
- **Edit:** Click to modify the details of the view (for personal views). Account level views cannot be edited, you can only create an editable copy of it.
- **Copy:** Click to copy the view. Creating a new view from a previous one is a quick and easy way to save a new view without having to start from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

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

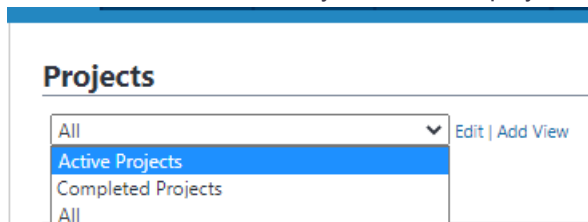
- **View Name:** Displays the name of the view.
- **Type:** Indicates whether it is a personal or an account view. Personal views are the ones that you've created while account views are created by an account administrator who has made the view accessible account-wide.
- **Status:** Indicates whether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

To access views for a module from the top navigation menu

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



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



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

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

Hide Account Views

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

To hide an account view from the Manage Views page

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

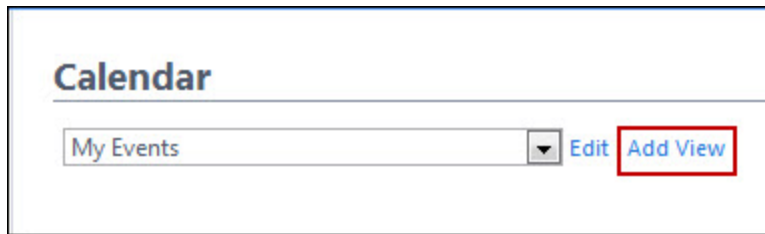
Create a View

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

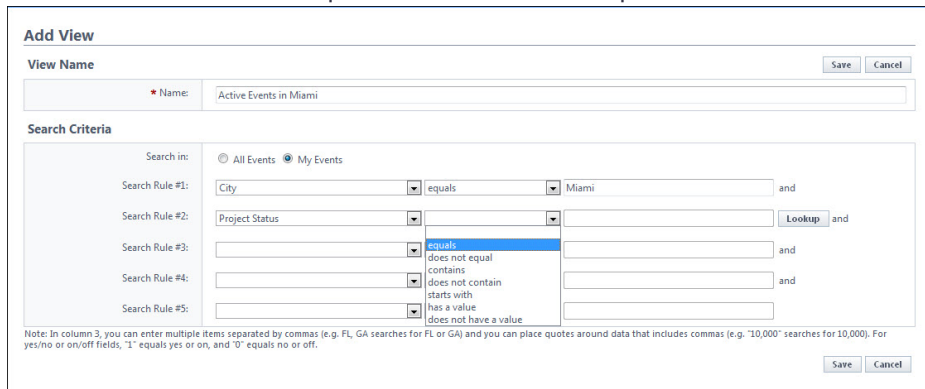
To create a custom view for a module

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

The Add View page is displayed.



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



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

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

- Days "d" to weeks "w" when the number of days equals or exceeds 21d and is less than 181d.
- Days "d" to months "mo" if the number of days exceeds 182d and is less than 361d.

- Weeks "w" to months "mo" if the number of weeks exceeds 26w.
 - Days "d" to years "y" if the number of days exceeds 360d
 - Weeks "w" to years "y" if the number of weeks exceeds 51w
 - Months "mo" to years "y" if the number of months exceeds 12mo
8. (Not available for the Calendar views) On the **Columns Displayed (numbered left to right)** section, select the columns from the drop-down list. These will be grouped from left to right.
 9. (Not available for the Calendar views) On the **Sort View** section, choose to either sort the selected column in an **Ascending** or **Descending** order.
 10. Click **Save**.

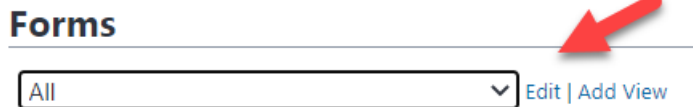
Create an Editable Copy of an Account View

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

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

To create an editable copy of an existing account view

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



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

You cannot edit the following Account View: All

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

Make a copy of this view and edit it
 Hide this view so it does not show in my list of views

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

Fields available on the Add / Edit View page

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

Search Options

Available in most modules

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

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

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

Available in the Processes module

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

Available in the Forms module

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

About Bidding

Owners, general contractors and other industry participants go through a bidding process to purchase goods and services associated with the development and construction of capital projects. e-Builder's Bidding module helps manage this bidding process and streamlines the exchange of documents, drawings and communications that surround it.

Without an online system, the typical bid process involves the distribution of plans and specifications to multiple bidders by hand delivery or express mail, which is expensive and very difficult to coordinate and manage. Though the bidding process itself is fast paced, it involves multiple back and forth exchanges, and requires that each step in the process be documented to minimize liability or misunderstandings later on. The communication process is difficult to manage, prone to errors, and labor intensive. To save time and money, bid managers often invite a smaller number of bidders or send partial information to bidders. At best, this results in less competitive bid results. At worst, this results in lost work, lawsuits, or projects that are not profitable because incorrect vendors were selected.

Benefits of using the Bidding Module in e-Builder

The e-Builder Bidding module is ideal for owners and general contractors or companies that operate in that capacity (e.g., third party program management companies).

This module provides the following benefits:

- Improved bid coverage which leads to more competitive pricing
- Streamlined exchanges of information such as plans and specifications between the bid manager and invited bidders. The bidders can access the Bidder's Portal and communicate directly with the bid manager.
- More efficient communications with automatic message and status tracking
- Cost reduction (i.e., shipping, printing, resources)
- Reduction in the time and effort associated with tracking and managing the entire bidding process
- Process standardization which increases efficiency and eliminates errors

- Easier access to historical data to improve future projects
- Increased competitive advantage with a more streamlined process

Key Concepts of Bidding

The following concepts are used within e-Builder:

- **Project:** To begin the bid process you must first create a project. Each real world project that your organization is participating in must be associated with a project in e-Builder. Your Project Administrator or Manager will be able to add you as a member of a project in e-Builder if you are working on it.
- **Contact:** To invite a bidder to one or more of your projects, you must have the bidder created as a contact first. Each contact invited must have a fax and/or email address.

Note: A contact is different from a standard e-Builder user. An e-Builder user is someone that has been added to the e-Builder account as a participant to a set of your projects. An e-Builder contact has a record of contact information (e.g. phone number, fax, email address, street address, etc.) associated with an e-Builder company. These contacts do not have access to all of your e-Builder project information; but can access only the project bid information that the contact is invited to. For every contact that is invited to bid, there will be a historical record of their participation in the contact details.

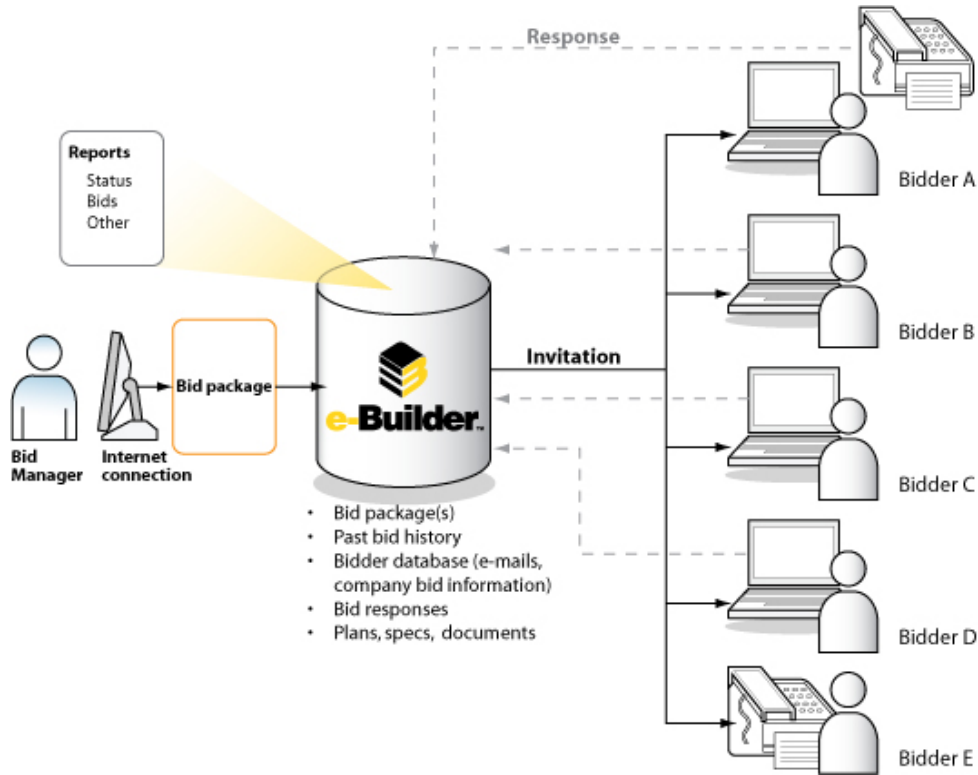
- **Company:** Each e-Builder contact is associated with an e-Builder company. There can be more than one contact associated with a company but only one company can be associated with a contact. Each contact can be an Invited Bidder and there can be more than one contact associated with a company that has been invited to bid. For every contact associated with a company that is invited to bid on a project there will be a historical record of their participation in the company details.

The Bidding Process Using e-Builder

Typically, there are three steps in the bidding process:

1. **Analyze the Bids:** Once the responses are submitted, the bid contact is notified. The bid contact can then review each submitted response and determine the best qualified bidder for the job. The e-Builder Bidding module updates the details of each invited bidder real-time when their status and/or responses are updated or submitted.
2. **Award the Project to the Winning Bidders:** Once the winning bidder has been determined, the bidding manager has the option to send a notification to the winner and/or losing bidders. For each contact invited to bid, e-Builder will keep track of their bidding history, such as the communications exchanged, whether they were awarded on their jobs, their statuses, etc.
3. **Close the Project:** After awarding the bidders you can close the project and begin executing the work.

The Bidding Process Using e-Builder



Access the Bidding Module

You can access the Bidding module of e-Builder using either of the following methods.

To access the Bidding page from the top navigation menu

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

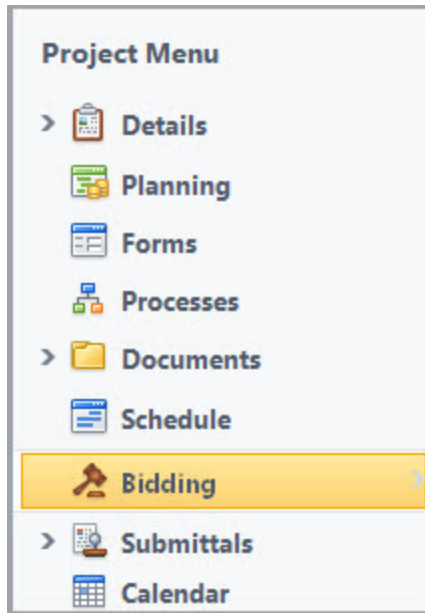
Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.
The Bid Packages page is displayed.
3. Click the name of a bid package to view the Bid Package Details page.

To access the Bidding page from within a project

- Click the **Project Bidding** link.
The Bid Packages page with a list of bid packages for the current project is displayed.



Bid Packages

The Bid Packages page provides detailed information about the bid package and project. On this page, information about the pre-bid meeting, bid contacts, tentative project start and end dates can also be viewed. Consultants, managers, auditors and other project bid participants might access this page for more granular information such as whether or not attendance to the pre-bid meeting is required, whether bids will be accepted after the bid due date, if adjustments are allowed on the bid tabulation, and if available, access to the public bids URL.

You can access the Bid Packages page from the top navigation menu or from within a project.

Tip: If you are already working on another module within the same project, you can access the Bidding module from the Project Menu located on the left side of the page. This will help you avoid having to reselect your project.

To access the Bid Packages page from the top navigation menu

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

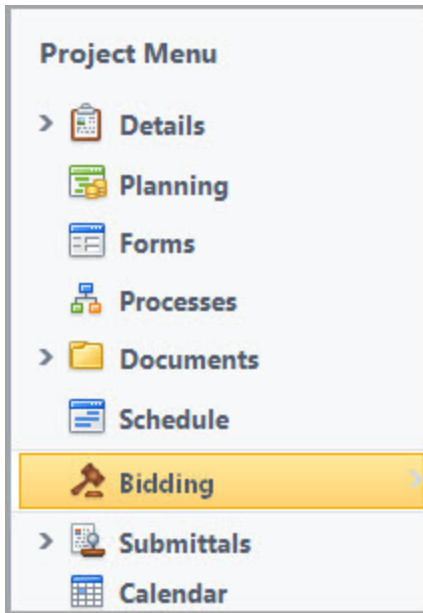
Tip: Use this method if you are not already working in a project.



To access the Bid Packages page from within a project

- Click the **Project Bidding** link.

The Bid Packages page with a list of bid packages for the current project is displayed.



Bid Package Details

Add or Edit Bid Packages

The Add/Edit Bid Package Details page allows administrators and bid managers to complete or edit the details of a bid package. From this page, the package and all related details can be defined such as the tentative project start and end dates, whether this is a private or public bid, if a pre-bid meeting is required and if bid submissions will be accepted after the bid due date. This information will be available for internal parties to access, such as account administrators, managers and auditors.

To add bid packages to the project

1. Go to the **Bid Packages** page.
2. Click **Add Bid Package**.
3. On the Add Bid Package Details page, complete all necessary fields.
4. Click **Save**.

To edit a bid package

1. Go to the **Bid Packages** page.
2. Click **Edit** beside the bid package.
The Edit Bid Package Details page is displayed.
3. Make all necessary changes.
4. Click **Save**.

Close Bid Packages

After the bidding process is completed and the bid has been awarded, the bid package can be closed. Once the project bid is closed, the status in the bid package details will change to closed.

Closing the bid package revokes access to the bid package for all invited bidders except for the awarded bidder. When the bid package is closed, bidders who have not been awarded will no longer see the bid package listed when they log into the Bidder Portal. Once the award has been granted, the awarded bidder can potentially be added as a licensed e-Builder user.

Once closed, the bid package can be reopened at a later date if necessary.

This task can be completed by:

- Pre-construction Managers
- Estimating Coordinators

Note: The Close button is available on every tab of the Bid Package Details page.

To close a bid package

1. Go to the **Bid Packages** page.
2. Click **Edit** beside the bid package.
The Edit Bid Package Details page is displayed.
3. Click **Close**.
4. Click **Yes, Close the Bidding** to confirm the action.

Related Topics:

- Additional Actions in the Bidding Module

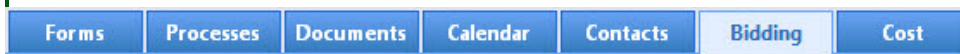
Bidding Details

The Bidding Details tab displays all of the project's bid information. Depending on your role in the project, you can view and edit all the details of the bid package from this page.

To access the Bid Packages page from the top navigation menu

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

Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.
The Bid Packages page is displayed.
3. Click the name of a bid package to view the Bid Package Details page.

Add Data to Custom Fields

Custom fields are designed to help further filter or refine your project bids by allowing you to track additional information. For example, custom fields can be used to store information such as the owner company and lead architect company related to this project or the square footage.

Custom fields are defined by the e-Builder Administrator in the Setup area. Your particular project may or may not have custom fields defined.

Note: The values of these fields are populated by the roles or users that have the Modify Bid permission, such as a Pre-construction Manager or Estimating Coordinator.

To add data to custom fields

1. Go to the **Bid Package Details** page.
2. On the **Bidding Details** tab, click **Edit**.
3. Click the **Custom Fields** tab at the bottom of the page.
4. Complete the custom fields as needed.
5. Click **Save**.

Add Notes

The Notes tab can be used to quickly add notes of importance relating to the project bid.

For example, the Estimating Coordinator can add a note to let internal team members know that there is currently an addendum that will be added to the bid contract and that is currently being approved by the board.

For each note entered, the name and company name of the user adding the note will be displayed along with the date when it was added. In e-Builder, the total number of notes created for the bid package will be displayed in parenthesis on the Notes tab header.

Note: Only internal e-Builder users will be able to see these notes. No invited bidder will be able to access this information. The invited bidder will only see the bid document folders contained within the Bid Documents Folder.

To add a note

1. Go to the **Bid Package Details** page.
2. Click the **Bidding Details** tab.
3. Click the **Notes** tab.
4. Click **Add Note**.
5. Enter your note in the **Note** field.
6. Click **Save**.

Attach or Remove Documents

On the Documents tab, you can view attached documents, attach documents or remove attached documents.

Tip

In IE 10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise.

To attach a document

1. Go to the **Bid Package Details** page.
2. Click the **Bidding Details** tab.
3. Click the **Documents** tab.
4. Click **Attach Documents**.
5. In the **Select Attachment Method** section, select your method of attachment.
6. Click **Browse For Files...**
7. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
8. If you are attaching files from e-Builder, go to step 9.

—Or—

If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.

9. Search for and select the e-Builder destination folder.
10. Click **Attach Selected**.

To remove documents

1. Go to the **Bid Package Details** page.
2. Click the **Bidding Details** tab.
3. Click the **Documents** tab located toward the bottom of the page. All available documents are listed.
4. Select the check box next to the document(s) you want to remove.
5. Click **Remove**.

Attach or Remove Forms

On the Forms tab you can attach supporting workflows to the project bid. The forms that can be attached are any open/ closed forms that have been created in the project.

To attach forms

1. Go to the **Bid Package Details** page.
2. Click the **Bidding Details** tab.
3. Click the **Forms** tab located toward the bottom of the page.

All available forms are listed.

4. Click **Attach Forms**.

The Fill Out Form on [Project Name] popup window is displayed with all workflow forms in your court.

5. Select the check box next to the form(s) you want to attach.
6. Click **Attach**.

To fill out a form

1. Go to the **Bid Package Details** page.
2. Click the **Bidding Details** tab.
3. Click the **Forms** tab located toward the bottom of the page.
All available forms are listed.
4. Click **Fill Out Form**.
The Fill Out Form on [Project Name] popup window displays with all available forms listed.
5. Click the title of the form type you want to fill out.
The Fill Out Form window displays.
6. Enter all required fields.
7. Click **Post Form**.

To remove a form

1. Go to the **Bid Package Details** page.
2. Click the **Bidding Details** tab.
3. Click the **Forms** tab.
4. Select the check box next to the form you want to remove.
5. Click **Remove**.

Attach or Remove Processes

You have the ability to view attached processes, attach processes or remove an attached process.

To attach a process

1. Go to the **Bid Package Details** page.
2. Click the **Bidding Details** tab.
3. Click the **Processes** tab.
4. Click **Attach Processes**.
The Attach Processes from [Project Name] popup window is displayed listing all available processes.
5. Select the check box next to the process you want to attach.
6. Click **Attach**.

To remove a process

1. Go to the **Bid Package Details** page.
2. Click the **Bidding Details** tab.
3. Click the **Processes** tab.
4. Select the check box next to the process you want to remove.

5. Click **Remove**.

Available on the Bid Package Details page

Toolbar Buttons

- **Save:** Click to save changes to the bid package details.
- **Cancel:** Click to disregard changes.

Bid Package Fields

- **Project:** Displays the project name.
- **Project Number:** If available, the project number displays in this field. Project numbers allow you to have a unique identifier for each of your projects. Account administrators can add project numbers by going to Administration Tools > Projects > Project Settings > Choose a custom field option from the Project Number Custom Field drop-down menu.
- **Bid Package:** Enter the name of the bid package in this field. This field is required.
- **Status:** Displays the status of the bid package.
- **Bid Package Description:** Enter a description of the bid package in this field.
- **Allow Public Bids?:** Select to make this a public bid package. When selected, public bid packages cannot be opened before the bid due date. In the view mode, a link to the Bidder Portal will be displayed in the **Public Bid Link** field for all public bid packages. This link is available here for easy distribution.
- **Allow Adjustments:** Indicates whether or not adjustments are allowed to the bid tabulation. When public bids are allowed, then this check box is selected by default and can be modified by bid managers while editing bid package details. When public bids are not allowed, this check box is disabled by default and cannot be modified. See Bid Tabulation for more information.

Package Invitation Fields

- **Pre-Bid Meeting Date/Time:** If applicable, select the date and time of the pre-bid meeting.
- **Pre-Bid Meeting Location:** If applicable, enter the location of the pre-bid meeting.
- **Required to Attend Pre-Bid Meeting?:** Select this check box if potential bidders are required to attend the pre-bid meeting. This field is applicable only if the pre-bid meeting details are provided.
- **Bidding Contact:** Select a bidding contact from the drop-down menu. This will be the person that potential bidders will contact if they have questions about the project.
- **Bid Start Date/Time:** Select the date and time that project bids will begin being accepted. This field is required.
- **Bid Due Date/Time:** Select the date and time that project bids will be due. This field is required.
- **Bid Time Zone:** Select a time zone for the bid package. This field is required.
- **Tentative Award Date:** Enter the latest tentative date that a package will be awarded.
- **Tentative Work Start Date:** Enter the tentative date that work is schedule to start on the project.
- **Tentative Work Finish Date:** Enter the tentative date that work is schedule to end on the project.
- **Allow Bids After Due Date?:** Select this check box to allow bidders to submit their bids after the due date. Optionally, you can specify a date and time as well.

- **Bid SqFt.:** Enter the square footage of the project. This information might be pertinent for administrators.
- **Bid Instructions Document:** Click the **Select file** link to attach bid instruction documentation. Only the name of this document will be available in read-only mode. Viewers will not be able to access this file.

Response Form Fields

- **Allow Electronic Bid Submission:** If the Enable Electronic Bid Submission setting is enabled on the account (Setup> Administration Tools> Bidding> Options), this check box is selected by default when a new bid package is created. However, Bid Managers can disable the ability for bidders to submit electronic bids for the specific bid package by clearing this check box.

Note: If the Enable Electronic Bid Submission setting is enabled and a bidder enters response information through the Bidder's Portal and saves it (without necessarily submitting it), the Allow Electronic Bid Submission setting on the bid package is disabled and cannot be turned off. Restricting electronic bid submissions might be necessary for public bid clients who require hard copy signatures. Typically, these clients bid on their projects through websites, newspapers, and other public means. For more information on this account setting, see Bidding Options.
- **Bid Documents Folder:** If the Bid Package is linked to the Plan Room, this field is not displayed. If available, select the document folder where bid documents will be stored for internal project participants to access.
- **Response Documents:** Use this section to specify how bidders can upload the response documents. These settings also prevent bidders from submitting unrequested files with their bid response.
 - **Free-form File Upload:** Select to allow bidders to optionally upload unspecified documents as attachments. When selected, a drag and drop zone will be displayed for bidders on the Response Documents tab of the Bidder's Portal. If this setting is left unchecked, bidders can only upload response documents to the Selected Custom File Fields listed under Predefined File Upload.
 - **Predefined File Upload:** Use this field to specify Bid Submission Custom fields that can be used to request for specific file uploads from the bidders. This field allows bidders to submit a predefined document through each defined custom file field. All account level bid submission custom fields of the type "File" (setup by the Admin on the Bid Submission Custom Fields page) are available for selection from the Custom File Fields list in the Edit mode. The bid submission custom fields specified here will be available for bidders on the Response Documents tab of the Bidder's Portal.
 - **Bid Response Documents Folder:** Select the folder path that bid documents will be uploaded to as they are received in the Bidder Portal.
- **Additional Info:** Use this section to add additional response information using bid submission custom fields.
 - **Bid Submission Custom Fields:** Select the required fields to display to the bidders from the non-file type custom fields available. The custom fields specified here will be available for bidders on the Additional Info tab of the Bidder's Portal.

- **Bid Award to Commitment:** If this setting is enabled on the account, this field is displayed and gives you the opportunity to determine the whether or not a commitment process can be created upon awarding a bid. If so, choose the method and/or process to be initiated. Choose from the following options:
 - **No Commitment (None)** - Select to disallow the initiation of a commitment process upon awarding a bid package. Commitment fields will auto-populate with data from the awarded bid package.
 - **Commitment (Non Process Commitment)** - Select to enable the creation of a non-process commitment upon awarding a bid package.
 - **Process** - All commitment process display in this section for you to choose one that may be initiated and populated with contract data from an awarded bid package.

Tabs

- **Custom Fields Tab:** If available, this tab lists all bid package custom fields. Custom fields are created by account administrators and used to capture additional information about bid packages. For more information, see Bidding Custom Fields.
- **Notes Tab:** Lists all available notes that may have been added about the bid package. You can also add notes about the bid package from this tab.
- **Documents Tab:** Displays a list of all attached documents. You can attach documents to the bid package from this tab as well.
- **Forms Tab:** Lists all forms that have been attached to this bid package. You can attach or remove forms from the bid package using this tab as well.
- **Processes Tab:** Lists all attached processes. You can attach or remove processes from the bid package using this tab as well.

Related Topics:

- Additional Actions in the Bidding Module

Bid Scope

Use the Bid Scope tab to define the scope of the bid for potential bidders. Once the scope is defined, bidders will need to provide the standard information you ask for and submit it in the format you need. This feature is most useful when there are multiple items to compare across the potential bidders. Having data in a common format simplifies this comparison process and ensures data quality and compliance standards are met.

Note: The Bid Scope tab will be displayed only if bid tabulation has been enabled in the account setup. Contact your e-Builder account administrator if you need access to this feature.

To access the Bid Packages page from the top navigation menu

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

Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.
The Bid Packages page is displayed.
3. Click the name of a bid package to view the Bid Package Details page.

Submit Quote Mode

For bid packages that are used for pre-qualification purposes or cases where the bid manager has a specific form that bidders need to complete and submit, the Submit Quote mode may be used.

Bid managers may use the Submit Quote mode when they have a preliminary qualifications round for short-listing the package and then a separate financial bid. If the bid manager has a very specific bid form to be downloaded and filled out, the Submit Quote mode may also be appropriate.

- In this situation, the bid manager does not set up any sections or line items on the Bid Scope tab. By not having Bid Scope line items, the package defaults to the Submit Quote mode because no financial data will be input into the Bid Response.
- On the Bid Response tab of the Bid Portal, the bidder will only see a button to upload their response document.

Note: Only one document is allowed to be uploaded.

- If the bidder needs to submit a revised quote prior to the bid deadline, use the Submit Quote button and re-upload a new document.

Note: The Recall Bid function is not available in this type of bid package.

- After the bid package deadline, the Bid Tabulation tab is not activated since there are no financial numbers or responses from the bidders to compare.

Bid Scope Creation

To simplify the process of creating a bid scope, you can import the data from a file, use a bid scope template or copy the bid scope from an existing project.

If you wish to create your own file or template, the e-Builder field names are listed below.

Bid Scope Section Fields				Previous	Next	Cancel
Section Name:	<input type="text" value="Section Name"/>	Section Type:	<input type="text" value="Section Type"/>			
Include Cost Per Sq Ft:	<input type="text" value="Include Cost Per Sq Ft"/>	Include Percent of Base Bid:	<input type="text" value="Include Percent of Base Bid"/>			
Include Percent of Section:	<input type="text" value="Include Percent of Section"/>					
<small>Note: Section Type: Include Cost Per Sq Ft; Include Percent of Base Bid; Include Percent of Section will be used only for new sections created</small>						
Bid Scope Item Fields				Previous	Next	Cancel
Item Number:	<input type="text" value="Item Number"/>	Detailed Description:	<input type="text" value="Detailed Description"/>			
Short Description:	<input type="text" value="Short Description"/>	Spec Reference:	<input type="text" value="Spec Reference"/>			
Quantity:	<input type="text" value="Quantity"/>	Part Number:	<input type="text" value="Part Number"/>			
Unit of Measure:	<input type="text" value="Unit of Measure"/>	Construction Code:	<input type="text" value=""/> (Bid package is not using CSI codes)			
Estimated Unit Cost:	<input type="text" value="Estimated Unit Cost"/>	Estimated Total Cost:	<input type="text" value="Estimated Total Cost"/>			
				Previous	Next	Cancel

Tip: Although these are the default fields, every field does not have to be used. Custom fields can also be created to accommodate your needs. Please contact your e-Builder Administrator if you require custom fields.

Note: If you are not using the template, please be advised that the spreadsheet file you are importing must have a defined header row for a successful import. The first row in the spreadsheet (highlighted in red below) should have the names of the columns you want to import.

	A	B	C	D	E	F	G	H
1	Section Name	Item Number	Short Description	Quantity	Unit of Measure	Estimated Unit Cost	Estimated Total Cost	Construction Code
2	Base Bid	1-1	Mobilization and Demobilization	1.00	LS	34,000.00	34,000.00	
3		1-2	Signage	2.00	EA	240.00	480.00	
4		1-3	Landscaping	1.00	LS	29,500.00	29,500.00	
5		1-4	Concrete	175.00	TN	92.00	16,100.00	
6		1-5	Masonry - Stonework - Exterior Trimmed Fieldston Veneer	890.00	SF	28.00	24,920.00	
7	Alternate A	A-1	Additional Office Space				75000.00	
8	CM FEE & General Conditions	C-1	Fee					
9		C-2	On-Site Project Management Staff					
10		C-3	Bonds & Insurance					
11		C-4	Temporary Project Utilities					
12		C-5	Field Offices & Office Supplies					

Import Bid Scope

If the column headers in your import document do not match the field labels within e-Builder, you will have to manually map each column to the associated e-Builder field.

If your import file column headers match the e-Builder field names, you can import your data without having to complete any field mapping. A template containing these column headers can be downloaded from e-Builder.

To import a bid scope

1. Go to the **Bid Package Details** page.
2. Click the **Bid Scope** tab.
3. Click **Import Bid Scope**.
The Import Bid Scope Items - Select Import File page is displayed.
4. In the Select How to Import Scope Items section, choose one of the following options:
 - o **Add new bid items:** Select this option to add the import items as new bid items.
 - o **Add new and update existing bid items:** Select this option to add new import items as well as update items that are already in the bid scope.
 - o **Overwrite existing bid items:** Select this option to use the import items to overwrite existing bid scope items.
5. In the Import File field, click **Choose File** to search for and attach an MS Excel import file (.xls or .xlsx format).

Tip: Click the **Download Import Template** link to download a template from e-Builder that you can use.

6. Click **Next**.
The Import Bid Scope Items - Field Mappings page is displayed.

7. To change any of the field mapping options, click the respective drop-down lists and make your selections.
8. Click **Next**.
The Import Bid Scope Items - Review page is displayed, allowing you to preview the fields of the bid scope.
- Note:** If there are any exceptions, they are listed on the Exceptions tab. Click the Exceptions tab to review errors. Go back to the MS Excel file and make any necessary corrections, and then repeat the import procedure.
9. Click **Import**.
A successful import confirmation is displayed.
10. Click **Finish**.

Apply a Bid Scope Template

Bid scope templates are created and made available by account administrators. Instead of manually creating the bid scope, you can apply a bid scope template or copy a bid scope from an existing project.

Users with Manage Templates permissions can perform these actions.

To apply a bid scope template or copy the bid scope from an existing project

1. Go to the **Bid Package Details** page.
2. Click the **Bid Scope** tab.
3. Click **Apply Template**.
The Apply Bid Scope Template dialog box is displayed.
4. To apply a bid scope template, select the **Bid Scope Template** option and then select the template from the **Template** drop-down menu.
—Or—
5. To copy the bid scope from an existing project, select the **Project Bid Package** option. Select the Project from the **Project** drop-down menu, and then select the bid package from the **Bid Package** drop-down menu.
6. Click **Apply**.

Additional Actions

Create Sections in the Bid Scope

Create sections in the bid scope to itemize and separate the different areas of the scope; such as general conditions and other fees, base bid, and alternates. This makes it easier for bidders to submit their bids and having a standard format simplifies the process of reviewing bids as well.

To create a section in the bid scope

1. Go to the **Bid Package Details** page.
2. Click the **Bid Scope** tab.
3. Click **Create Section**.
The Add Bid Section popup window is displayed
4. Enter the following information and complete all necessary fields:
 - **Name**: Enter the name of the section. This is a required field.
 - **Type**: The **Base Bid** is the main section to collect the bids and is required in all bid scope definitions. Choose **Alternate** for all other sections. This is a required field.
 - **Include Cost Per SqFt**: If square footage was entered in the bid details, selecting this check box will allow the system to calculate the square footage per bid scope item in the bid tabulation. If this check box is selected, you are also able to filter by square footage on the Bid Tabulation tab.
 - **Include Percent of Base Bid**: This option is directly related to bid tabulation. Select this check box to enable the display percent of base bid total option located on the Bid Tabulation tab.
 - **Include Percent of Section**: This option is directly related to bid tabulation. Select this check box to enable the display percent of section name option located on the Bid Tabulation tab.
5. Click **Save**.

Add Items to Sections

Items can only be added to a section after the section has been created

To make an item "unit cost", the Bid Manager has to provide the details in the Quantity and the Unit of Measure (UoM) fields. The bidder then submits a "unit rate" against that quantity. If the Bid Manager fills in the Estimate/ Unit Cost field details on a unit cost item, that rate is saved for reference and only the Bid Manager will be able to see it. This is useful for later comparison on the Bid tab. If the Bid Manager fills in the Estimate/ Unit Cost field details on a lump sum item, that amount is saved for the Bid Manager's reference as well.

To add items to bid scope sections

1. Go to the **Bid Package Details** page.
2. Click the **Bid Scope** tab.
3. Click **Add Item** located in the respective section.
The Add Bid Item popup window is displayed.
4. Complete all required fields (marked with an *):
 - **Bid Section**: The bid scope section that the item is created in. This field is not editable.
 - **Item Number***: Enter or select the item number in this field.
 - **Short Description***: Enter a description for the bid item.
 - **Spec Reference**: Enter the specification reference number for the item.
 - **Part Number**: Enter the part number for the item.

- **Quantity:** Enter a quantity for the item.
 - **UoM:** Select a unit of measure from the drop-down list for the quantity entered.
 - ▮ **Note:** When entering the quantity, the unit of measurement is a required field.
 - **Estimate/ Unit Cost:** Enter an estimate of the cost per unit of the item. If a non-zero quantity is entered, this amount is the estimated unit cost else it is the total estimate and no unit cost information will be saved.
 - **Budget Line Item:** Select a budget line item. This field is displayed only when "Bid Award to Commitment" is turned on under Bid Options.
 - **Construction Code:** Select the construction code for the item from the drop-down list. This field is displayed only when construction codes are managed.
 - **Details:** Enter a description of the item and provide more details about it.
5. Click **Save**. The popup window remains open, allowing you to add additional line items by repeating the previous steps.
 6. When you are done adding items, click **Cancel** to close the popup window.

Add a Formula

Formulas can be created to add different sections together so that you can look at the bid submissions in different ways.

For example, base bid + alternate 1, or base bid + alternate 1 and alternate 2.

▮ **Note:** These formula results are not shown to the bidders, only to the bid manager when the bid tabulation is opened.


To add a formula

1. Go to the **Bid Package Details** page.
2. Click the **Bid Scope** tab.
3. Toward the bottom of the page, click **Add Formula**.
The Add formula dialog is displayed.
4. Enter the name of the formula in the **Name** field.
5. Select the check box next to the section(s) you want to include in your formula.
6. Click **Save**.
The totals are displayed at the bottom of the page, in the Bid Summary section.

Export the Bid Scope

The bid scope can be exported to an MS Excel spreadsheet enabling you to share pertinent bid scope estimations with others who may not have access to e-Builder Enterprise or the Bidding module.

To export the bid scope to an Excel spreadsheet

1. Go to the **Bid Package Details** page.
2. Click the **Bid Scope** tab.
3. Click the export to Excel icon ().
The MS Excel spreadsheet is downloaded.

Add Additional Information

The Additional Information feature allows you to capture and track pertinent data about potential bidders to help you make the best and most informed decision. You can choose to add questions that you require potential bidders to answer, include relevant data that potential bidders cannot see, use the data for bid tabulation, or all of the above.

Individual additional information records can be added one at a time or you can add records that have been used in different projects.

To add an additional information record

1. Go to the **Bid Package Details** page.
2. Click the **Bid Scope** tab.
3. Click the **Additional Information** tab.
4. In the **Prompt/Question** field, enter the prompt or question.
5. Select all check boxes that apply:
 - **Bidder Entry**: Select this check box to allow the prompt/question to be visible for bidders to fill out.
 - **Required**: Select this check box to make the prompt/question a required field for bidders to complete. If you select this check box, the Bidder Entry check box will also be selected by default.
 - **Include in Bid Tabulation**: Select this check box to include the prompt/question in the bid tabulation. This facilitates comparing bidders based on the additional information entered.
6. Click **Save**.

To add an additional information record from a project

1. Go to the **Bid Package Details** page.
2. Click the **Additional Information** tab.
3. To include records used in a particular project, click **Add From Project**.
The Add Additional Information window is displayed.
4. From the **Project** drop-down list, select the project from which the additional information records will be copied.
5. Select a bid package from the list of project results.
6. Select the check box next to the question/ prompt you want to add.
7. Click **Add**.

8. Click **Close** to return to the **Additional Information** tab.

Add Addenda

When there is a change to the bid scope, adding an addendum is a fast and easy way to get the information to all parties at once. Bidders receive an email notification when an addendum is issued. When they log into the portal, they can review the text of the addendum under the Package Invitation/ Addenda tab. Prior to submitting a response, the bidder is required to acknowledge every issued addendum with a check box on the STEP 3: Additional Required Info tab.

Note: An addendum can only be added after an invitation to bid has been sent out but new addenda cannot be added after the bid tabulations has been opened. Addenda notifications are sent out to all invited bidders, irrespective of whether they have responded to the invitation to bid or not. If the bidder already submitted their bid after the addendum was issued, the bidder will receive notification requiring them to resubmit their bid and acknowledge the addendum.

The addendum is text-only. If new documents are issued as a result of the addendum, add a new folder inside the designated Bid Documents folder as a best practice. The bidders will see this folder on the portal in the Invitation Documents tab.

To add an addendum

1. Go to the **Bid Package Details** page.
2. Click the **Bid Scope** tab.
3. Click the **Addenda** tab.
4. Click **Add Addendum**.

The Add Addendum for Bid Package popup window is displayed.

5. Enter the following information:
 - **Addendum Number:** Enter a number for the addendum.
 - **Description:** Enter a description for the addendum.
 - **Details:** Enter the details of the addendum. This is optional.
 - **Documentation Available Date:** Enter or select the date and time at which the details of the addendum will be available for bidders to view. This is optional.
6. Click **Save**.

Available on the Bid Scope page

Fields

- **Project:** Displays the project name.
- **Bid Package:** Displays the name of the bid package.
- **Project Number:** If available, the project number is displayed in this field. Project numbers allow you to have a unique identifier for each of your projects. Account administrators can add project num-

bers by going to Administration Tools > Projects > Project Settings > Choose a custom field option from the Project Number Custom Field drop-down menu.

- **Status:** Displays whether the bid package is open or has been closed.

Tabs

The following tabs are available on the Bid Scope page:

Scope Tab

- **Create Section:** Click to create the different sections of the bid scope. Creating sections helps you itemize the bid scope, clearly separating the different areas of scope; such as general conditions and other fees, base bid, and alternates. This makes it easier for bidders to submit their bids and having a standard format simplifies the process of reviewing bids as well. This button is only available prior to sending out the invitation to bid. Once the invitation has been sent this button will disappear. To make changes after this point, you will have to create an addenda.
- **Add Item:** One of these buttons is displayed for all sections that have been created. Click to add the details of the individual items that contractors will bid on. This button is only available prior to sending out the invitation to bid. Once the invitation has been sent this button will disappear. To make changes after this point, you will have to create an addenda.
- **Base Bid:** The Base Bid is completed by bid managers when creating the sections of the bid scope. This is the only required section of the bid scope. When the quantities and prices to complete the project have been estimated, the bid manager uploads these figures to use as a comparison when potential bidders begin to submit their figures.
- **Add Formula:** Click to add formulas, which allows you to add different sections of the bid scope together so that you can look at the bid submissions in different ways. For example, base bid + alternate 1, or base bid + alternate 1 and alternate 2. These formula results are not shown to the bidders, only to the bid manager when the bid tabulation is opened.
- **Bid Summary:** This section of the bid scope will auto-populate a summary of the totals in all previous sections of the bid scope.

Additional Information Tab

The additional information tab allows you to capture and track pertinent data about potential bidders to help you make the best and most informed decision. You are able to choose which of the sets of information is visible to potential bidders and which will be hidden from their view. You can choose to add questions that you require potential bidders to answer, include relevant data that potential bidders cannot see, use the data for bid tabulation, or all of the above.

- **Add From Project:** Click to pull in questions/ responses from another package on any project to avoid having to re-enter the same information with every bid package.
- **Question/ Prompt:** Displays after additional information has been added. This column lists the questions or additional information that you're tracking or want potential bidders to complete.

- **Bidder Entry:** Displays after additional information has been added. A check mark in this column indicates that the question/ prompt is visible to potential bidders.
- **Required:** Displays after additional information has been added. A check mark in this column indicates that the question/ prompt is a required field for potential bidders to complete.
- **Include in Bid Tabulation:** Displays after additional information has been added. A check mark in this column indicates that the question/ prompt will be included in the bid tabulation.
- **Add Additional Information:** Use this section to quickly add additional information records.
 - **Prompt/ Question:** Enter the questions or prompt in this field.
 - **Bidder Entry:** Select this check box to allow the prompt/ question to be visible for bidders to fill out.
 - **Required:** Select this check box to make the prompt/ question a required field for bidder to fill out.
 - **Include in Bid Tabulation:** Select this check box to include the prompt/ question in the bid tabulation. This facilitates comparing bidders based on additional information.
- **Save:** Click to save the new additional information record.

Addenda Tab

When there is a change to the bid scope, adding an addendum is a fast and easy way to get the information to all parties at once. When bidders log into the bidder portal, they will be able to view and acknowledge that they have seen all addenda items.

Note: An addendum can only be added after an invitation to bid has been sent out, but new addenda cannot be added after the bid tabulation has been opened.

- **Add Addendum:** Click to add an addendum. This button will only be visible after an invitation to bid has been sent out, and before the bid tabulation has been opened.
- **Addendum Number:** Each time an addendum is added, you must assign a number to it. That number displays in this column.
- **Description:** Displays the description of the addendum.
- **Date Created:** Displays the date the addendum was created.
- **Documentation Available Date:** Displays the date that the details of the addendum will be available for bidders to view.

Related Topics:

- Additional Actions in the Bidding Module

Potential Bidders

Bidders who may be good candidates to bid on a project can be added to the potential bidder list.

Use the Potential Bidders tab as a staging area to build out a list of potential bidders without actually inviting them to bid.

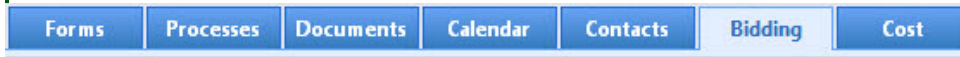
Depending on the permission assignment, the following tasks can be completed by either:

- Pre-construction Managers
- Estimating Coordinators

To access the Bid Packages page from the top navigation menu

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

Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.
The Bid Packages page is displayed.
3. Click the name of a bid package to view the Bid Package Details page.

Add Potential Bidders

Potential bidders can be selected from your contacts or from a previous project. Only e-Builder contacts can be invited to the bidders list. Only contacts with an email address or fax can be added, otherwise, they will not be displayed on the Contacts Filter.

If you assigned codes on the bid package, then you will only be able to invite those whose company has assigned to them at least one of the codes configured in the bid package.

Note: You will not be able to assign CSI codes to this bid package once a bidder has been added / invited.

To add bidders from contacts

1. Go to the **Bid Package Details** page.
2. Click the **Potential Bidders** tab.
3. Click **Add**.
The Filter Contacts popup window displays.
4. Enter any pertinent information that will help you find the contact.

Note: The least amount of information entered renders the most results. The more specific information you enter, the narrower your results will be.

Tip

To see a list of all available contacts, do not add any information at all, just click **Filter**.

5. Click **Filter**.
Results display in the Contacts section toward the bottom of the window.
6. Select the check box next to the contact(s) you want to add.
7. Click **Insert Selected**.

In order to save time and resources, you can add bidders that were previously invited on another or similar bid project. This feature mines the e-Builder database locating good potential bidders, based on their past project experience.

Note: You will not be able to assign CSI codes to the bid package once a bidder has been added / invited.

To add bidders from a previous project

1. Go to the **Bid Package Details** page.
2. Click the Potential Bidders tab.
3. Click **Add From Project**.
The Add Potential Bidders from [Project] page is displayed.
4. Enter all required fields.
5. Click **Filter**.
A list of bidders that meet the filter criteria is displayed.
6. Click the check box next to the bidders you want to add.
7. Click **Add**.

Invite Potential Bidders

Before potential bidders can be invited to bid, they must first be added.

Once the invitations are sent, potential bidders that are invited using the Potential Bidders tab will automatically be added to the Invited Bidders Tab.

Note: If contacts are assigned to construction codes, and a potential bidder is invited on a particular code, the contact is removed from only that code. If the contact is a potential bidder on another code, that contact will still appear in this list. If the potential bidder is invited on all codes, they will be removed from this list.

To invite potential bidders

1. Go to the **Bid Package Details** page.
2. Click the **Potential Bidders** tab.
3. Select the check box next to the potential bidders you want to invite.
4. Click **Invite**.
The Invite Bidders page is displayed.
5. Take any of the following actions on the Invite Bidders page:
 - Enter a message
 - Add/ Remove additional contacts
6. Click **Send**.

Remove Bidders from Potential Bidders List

If a bidder was included by mistake, you can remove them from the list. Each bidder has a bidder history, and if you delete a potential bidder, they are removed from the list and there will be no historical record that the bidder participated on the project.

Note: If you are managing users by construction codes, deleting the user will remove them completely from all construction codes. You can also disassociate a bidder from a specific code by deleting just that code located under the bidder's name (Bidder View).

To delete a potential bidder

1. Go to the **Bid Package Details** page.
2. Click the **Potential Bidders** tab.
3. If you are using construction codes to manage bidders, ensure that you are in the Bidder's View by selecting **Bidders** from the **Show** drop-down list.
4. Select the check box next to the potential bidder's name.
5. Click **Delete**.
6. Click **OK**.

To remove a specific construction code for a bidder

1. Go to the **Bid Package Details** page.
2. Click the **Potential Bidders** tab.
3. Ensure that you are in the Bidder's View by selecting **Bidders** from the **Show** drop-down arrow.
4. Click the plus sign next to the potential bidder to view all associated construction codes.
5. Select the check box next to the construction code(s) you want to remove.
6. Click **Delete**.
7. Click **OK**.

Print Potential Bidders List

Use the Print feature on the Potential Bidders tab to print out a list of potential bidders to use.

To print a list of potential bidders

1. Go to the **Bid Package Details** page.
2. Click the **Potential Bidders** tab.
3. Click **Print**.

Reopen Bid Packages

If a bid package is closed and you have modify bidding permissions, then you can always reopen the package at any time. This feature prevents the project bid from being locked down when it is closed.

To reopen a bid package

1. Go to the **Bid Package Details** page.
2. Click the **Potential Bidders** tab.
3. Click **Re-open**.

Potential Bidders Tab Details

Fields

- **Project:** The name of the project.
- **Bid Package:** The name of the bid package.
- **Project Number:** If available, the project number is displayed in this field. Project numbers allow you to have a unique identifier for each of your projects. Account administrators can add project numbers by going to Administration Tools > Projects > Project Settings > Choose a custom field option from the Project Number Custom Field drop-down menu.
- **Status:** The status of the bid package (open or closed).

Additional Actions

- **Show Notes:** Select this check box to view notes directly on the table for each respective contact.

Switch Views

If you chose to use construction codes to identify bidders, you can access two different views - the Bidders view and the Construction Codes view. These views are available on the Potential Bidders tab and the Invited Bidders tab.

To switch between the views click the **Show** drop-down arrow.

- **Bidders View:** The bidders view displays each potential/ invited bidder, their company name, contact person, email, fax, phone number and the date their contact information was entered into e-Builder. If construction codes were used to categorize your contacts, click the expand button under each contact to view all associated divisions and construction codes.
- **Construction Codes View:** The Construction Codes View is only available if you've managed bidders by construction codes. The construction codes view displays a list of construction codes assigned to the project, grouped by division, with the number of potential/ invited bidders associated with each division in the column on the right.

Invite Bidders Page Details

This page can be accessed by clicking the Invite button on the Potential Bidders tab on the Bid Package Details page.

Fields

- **Project:** The name of the project.
- **Project Number:** If available, the project number is displayed in this field.
- **Subject:** The subject of the invitation message.
- **Message:** The message body of the invitation.
- **Selected Bidders:** The contacts who have been selected to receive the invitation.
- **Custom Fields:** When available, this section includes the custom fields set up by Administrators under Invitation Custom Fields.

Related Topics:

- Invited Bidders Tab
- Additional Actions in the Bidding Module

Invited Bidders

The Invited Bidders tab displays a list of all who have been invited to bid on the project.

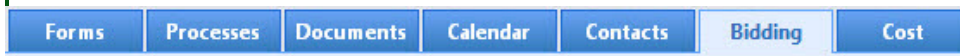
Depending on the permission assignment, the following tasks can be completed by either:

- Pre-construction Managers
- Estimating Coordinators

To access the Bid Packages page from the top navigation menu

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

Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.

The Bid Packages page is displayed.

3. Click the name of a bid package to view the Bid Package Details page.

Invite Additional Bidders

Use the Invite feature to send out invitations to bid to new contacts (not already included in the invited bidders grid), or to add additional codes to existing invited bidders. Once you send the invitation to bid, all contacts selected will be included in the Invited Bidders List.

The bidding instructions document will be attached to the email with the invitation.

Note: If you are using the construction codes feature to identify bidders, the companies' construction codes must match those assigned to the project for contact to show up on the filter.

To invite additional bidders

1. Go to the **Bid Package Details** page.
2. Click the **Invited Bidders** tab.
3. Click **Invite**.
The Invite Bidders page is displayed.
4. Enter or modify the subject of the invitation mail in the **Subject** field.
5. Enter an optional message to the bidders in the **Message** field.
6. Click **Add Contact** or **Remove Contact** to add or remove additional contacts.
7. Click **Send**.

Re-invite Bidders

Use the Re- invite feature to resend the invitation to bid to a contact who may have misplaced the invitation or may not have responded to the previous invitation.

To re-invite bidders

1. Go to the **Bid Package Details** page.
2. Click the **Invited Bidders** tab.
3. Select the check box next to the bidder(s) you want to re-invite.
4. Click **Re-invite**.
The Invite Bidders page is displayed.
5. Enter or modify the subject of the invitation mail in the **Subject** field.
6. Enter an optional message to the bidders in the **Message** field.
7. Click **Add Contact** or **Remove Contact** to add or remove additional contacts.
8. Click **Send**.

Update Bid Status

If you are viewing the list of invited bidders using Bidders View, you can update the status of bidders manually. It is important to clarify that e-Builder automatically updates the bid status of each invited bidder based on their responses via the bidder portal. The status is set to Pending when an invitation has been sent but no response has been received. Once an invited bidder responds electronically, (Will bid or Will not bid) the status is updated accordingly. You also have the option of manually updating the bidder's status.

To manually update the bid status

1. Go to the **Bid Package Details** page.
2. Click the **Invited Bidders** tab.
3. In the Invited Bidders table, click the drop-down lists under the **Bid Submitted** and **Status** columns to manually change each status.

Print Invited Bidders List

Use the Print feature on the Invited Bidders tab to print out a list of potential bidders to use.


To print the invited bidders list

1. Go to the **Bid Package Details** page.
2. Click the **Invited Bidders** tab.
3. Click **Print**.

Export Invited Bidders List to Excel®

Exporting bid coverage information is useful for bid analysis purposes. This is a handy feature that allows you to include data for use in external financial reports. The export feature allows you to avoid manual data entry and export right from e-Builder into Excel.

To export the Invited Bidders List to Microsoft Excel®

1. Go to the **Bid Package Details** page.
2. Click the **Invited Bidders** tab.
3. Click the Export to Excel icon  .


Award Bidders

Use the Award feature to simultaneously send a bid award notification to the winning bidder and notifications to other bidders who have submitted a bid response.

Note: If the Bid Award to Commitment feature has been activated on the Bid Options page (Setup > Bidding > Options), then the designated commitment process can also be initiated when the bid is awarded.

Tip: If the incorrect bidder was selected, select the **Undo Award** option to rescind the bid award. Note that messages that were already sent cannot be retracted.

To award a bidder


1. Go to the **Bid Package Details** page.
2. Click the **Invited Bidders** tab.
3. Click the  button beside the bidder you want to award.
4. Select the **Award** option from the Bidder Options popup menu.
The Award Notification window is displayed.
5. Select the **Send message to the winning bidder** check box and enter or modify the message to the winning bidder in the **Message** field.
6. Select the **Send message to the other bidders** check box and enter or modify the message to the other bidders in the **Message** field.
7. Click **Send**.

Note: If the Bid Award to Commitment feature was activated, the **Send and Initialize Commitment Process** button will be displayed on this page. Use this button to send the bid award notification message and initiate the commitment process.

Revoke Invitation to Bid

Use the Revoke feature to prevent a bidder from participating in the bid but continue to keep them in the Invited Bidders list for historical purposes.

To revoke an invitation to a bidder

1. Go to the **Bid Package Details** page.
2. Click the **Invited Bidders** tab.
3. Click the  button beside the bidder invitation you want to revoke.
4. Select the **Revoke** option from the Bidder Options popup menu.


- In the popup that is displayed, select **OK** to confirm the action.

Tip: If the incorrect bidder was selected, select the **Restore** option from the Bidder Options popup menu to undo the revocation.

Delete Invitation to Bid

Use the Delete feature to remove the bidder entirely from the bid and the Invited Bidders list. When this feature is used, the bidder will not be tracked in the bid history either. A bid manager will most likely delete a bidder only if they were accidentally invited.

To delete an invitation to a bidder


- Go to the **Bid Package Details** page.
- Click the **Invited Bidders** tab.
- Click the  button beside the bidder invitation you want to delete.
- Select the **Delete** option from the Bidder Options popup menu.
- In the popup that is displayed, select **OK** to confirm the action.

Invited Bidders Tab Details

Fields

- Project:** The name of the project.
- Bid Package:** The name of the bid package.
- Project Number:** If available, the project number is displayed in this field. Project numbers allow you to have a unique identifier for each of your projects. Account administrators can add project numbers by going to Administration Tools > Projects > Project Settings > Choose a custom field option from the Project Number Custom Field drop-down menu.
- Status:** The status of the bid package (open or closed).

Additional Actions

- Show Notes:** Select this check box to view notes directly on the table for each respective contact.
- : Click the Notes button to add or view notes for the contact such as call logs.
- Contact:** Click the contact name to view the invitation details for that contact.
- Status:** Click this drop-down list and manually change the status of the construction code or bidder (if construction codes were not used).

Note: e-Builder automatically updates the bid status of each invited bidder based on their Accept or Decline response via the bidder portal. The status is set to Pending when an invitation has been sent but no response has been received. Once an invited bidder accepts or declines electronically, the status is updated to Will Bid or Will Not Bid.

- Bid Submitted:** Select whether the bid was submitted or not.

- **Show:** If you chose to use construction codes to identify bidders, you can access two different views from this drop-down menu:
 - **Bidders View:** Choose this view in order to view the list of invited bidders by company name and contact information. If there are construction codes associated with the contact, expanding the contact will display the associated construction code(s).
 - **Construction Codes View:** Choose this view to see a list of construction codes. The # Invited column will allow you to see how many bidders are on the invited list from each division. Expanding the division will display the associated contact(s).

Invite Bidders Page Details

This page can be accessed by clicking the Invite button on the Invited Bidders tab on the Bid Package Details page.

Fields

- **Project:** The name of the project.
- **Project Number:** If available, the project number is displayed in this field.
- **Subject:** The subject of the invitation message.
- **Message:** The message body of the invitation.
- **Selected Bidders:** The contacts who have been selected to receive the invitation.
- **Custom Fields:** When available, this section includes the custom fields set up by Administrators under Invitation Custom Fields.

Switch Views


If you chose to use construction codes to identify bidders, you can access two different views - the Bidders view and the Construction Codes view.




These views are available on the Potential Bidders tab and the Invited Bidders tab. To switch between the views click the **Show** drop-down arrow.

Bidders View

The bidders view displays each potential/ invited bidder, their company name, contact person, email, phone number and the date their contact information was entered into e-Builder. If construction codes were used to categorize your contacts, click the expand button under each contact to view all associated divisions and construction codes.

Bidders View Fields

-  **(Notes Icon):** Click to add a note to the invited bidder's record. You're able to see all added notes by expanding the bidder's record.
- **Company:** This column displays the name of the company that the invited bidder belongs to.
- **Contact:** This column displays the invited bidder's name.
- **Email:** This column displays the invited bidder's email address.

- **Phone:** This column displays the invited bidder's phone number.
- **Bid Submitted:** This column displays whether or not the bid has been submitted.
-  (**Bidder Options Icon**): The Bidder Options icon () allows you to take any of the following actions:
 - **Re-Invite:** Select this option to resend an invitation to bid.
 - **Revoke:** Select this option to remove the bidder from participating in the bid but keep them in the invited bidder list for historical purposes.
 - **Award:** Select this option to award the bid.
 - **Delete:** Select this option to remove the bidder entirely from the bid no history will be tracked. A bid manager most likely will only delete a bidder in the event that they were accidentally invited.
 - **Submit Bid:** Select this option to submit the bid.
 - **Undo Award:** Select this option rescind an award.
-  (**Update Status Icon**): Click this icon to update the bidding status of all construction divisions associated with a single bidder.

Construction Codes View

The Construction Codes View is only available if you've managed bidders by construction codes. For more information, see Manage Construction Codes. The construction codes view displays a list of construction codes assigned to the project, grouped by division, with the number of potential/ invited bidders associated with each division in the column on the right.

Construction Codes View Fields

- **Code:** This column lists all available construction codes. Expanding the division will display the associated contact(s).
- **# Invited:** This column displays the number of bidders that have been invited to bid from each division. The Status drop-down menu is editable, so you're able to update the status of each person's invitation manually, but it is important to note that e-Builder automatically updates the bid status of each invited bidder based on their responses via the bidder portal. The status is set to Pending when an invitation has been sent but no response has been received. Once an invited bidder responds electronically, ('Will bid or Will not bid') the status is updated accordingly.
- **# Pending:** This column displays the number of invited bidders whose invitation to bid is pending. This status is automatically applied by e-Builder if an invitation has been sent but no response has been received. When the division is expanded, the Response field is editable and allows you to update the response to Yes or No.
- **# Declined:** This column displays the number of invited bidders who have declined to bid.
- **# Accepted:** This column displays the number of invited bidders who have accepted the invitation to bid.

- **# Bids:** This column displays the number of bids the invited bidder was invited to.
- **# Awarded:** This column displays the number of bids the invited bidder has been awarded. The award icon provides a visual indication of the bidder's awarded status.

Related Topics:

- Additional Actions in the Bidding Module

Bid Documents

The Bid Documents tab displays all the folders and files that the invited bidders have access to. On the Bid Documents tab, the bid manager can check whether the bid details are set properly for the bidders to view when they get invited and login to the Bidder's Portal.

When you create a bid package or edit the bid details, you have to select a Bid Documents Folder. This Bid Documents Folder is mapped to your e-Builder Documents repository.

Note: Any sub folders and files created in the mapped folder are also accessible by the invited bidders.

To access the Bid Packages page from the top navigation menu

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

Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.
The Bid Packages page is displayed.
3. Click the name of a bid package to view the Bid Package Details page.

View and Download Bidding Documents

As a bid contact, you have the ability to view and download documents that your bidders can access.

To view bidding documents

1. Go to the **Bid Package Details** page.
2. Click the **Bid Documents** tab.
All the folders and files that invited bidders have access to are displayed.
3. Navigate to the required file and then click the file to view it.

To download bidding documents

1. Go to the **Bid Package Details** page.
2. Click the **Bid Documents** tab.
All the folders and files that invited bidders have access to are displayed.

3. Navigate to the required file and then select the check box next to the file.

Note: You must select at least one file to download.

4. Click **Download**.

Display History of Invited Bidders

The Bid Documents Access History page displays the history of all the invited bidders' activity within the Bid Documents folders. For example, if a user from a company viewed an architectural file, then a row will be inserted in the table with a date and time stamp of this action. If the user downloaded the document, this will also be shown.

Using this page, the Estimating Coordinator or Manager will be able to determine who has viewed, downloaded, ordered or picked up prints and can use this information to equip the estimating team with a firm understanding of recent activity.

To display the history of invited bidders' activity

1. Go to the **Bid Package Details** page.
2. Click the **Bid Documents** tab.
3. Click **History**.

The Bid Documents Access History page is displayed with all the available access history records for the Bid Documents.

Tip: Use the **Filter** section to narrow down the results.

Related Topics:

- Additional Actions in the Bidding Module
- Assistance for Invited Bidders

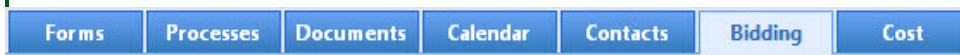
Questions/Responses

Bid contacts can use the Questions/ Responses tab to share questions and communicate responses to the bidders. All inquiries and responses posted here are sent to all bidders via email. This eliminates the need to send multiple emails, and is a great way to broadcast information that is useful to all the bidders.

To access the Bid Package Details page from the top navigation menu

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

Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.

The Bid Packages page is displayed.

3. Click the name of a bid package to view the Bid Package Details page.

Add Questions

The Questions/ Responses tab displays questions submitted by bidders or users and allows the Bid Contact to post answers either publicly or directly to the bidder.

To add questions

1. Go to the **Bid Package Details** page.
2. Click the **Questions/Responses** tab.
3. Click **Add Question**.
The **Bidder Question** popup window is displayed.
4. Complete the following required fields:
 - **Subject:** Enter a subject for the question
 - **Question:** Enter the question.
 - **Response:** Add a response to the question.
 - **Send response to all bidders?:** Select this check box to allow all bidders to view your response.
5. Click **Save**.

Respond to Bidder Questions

Questions posted by bidders in the Bidder's Portal will be displayed on the Questions/ Responses tab in e-Builder. A message will also be displayed, indicating the number of questions awaiting responses.

You can answer the bidders question and make the response publicly visible to all bidders or answer the bidder directly.

Note: Only the Bid Contact or users with Modify Bidding permissions can respond to bidder questions.

To respond to a bidder's question

1. Go to the **Bid Package Details** page.
2. Click the **Questions/Responses** tab.
3. Click a question to view it.
4. Enter your response in the responses field.
5. Select the **Send the response to all bidders** check box to allow all bidders to view your response.
—Or—
Leave this check box unselected to send the response only to the user who asked the question.
6. Click **Reply**.

Export Questions and Responses

Use the export feature to export the questions and responses to your local machine. You can then share the relevant information to non e-Builder license holders, such as Architect/ Engineers and all other applicable parties if needed.

The exported file will be in the MS Excel (.xls) format.

To export questions/ responses

1. Go to the **Bid Package Details** page.
2. Click the **Questions/Responses** tab.
3. Click **Export**.
4. To export only the unanswered questions, select the **Only Unanswered** check box in the **Export Questions** popup.
5. Click **Export Now**.

Additional Actions

- **Show:** Select any of the available options to filter the questions displayed in this section.

Related Topics:

- Additional Actions in the Bidding Module

Bid Tabulation

The Bid Tabulation feature helps bid managers save a significant amount of time. You can focus more on bid analysis without having to arrange bid results side-by-side for comparison using multiple spreadsheets. The tabulation is updated instantly whenever a change is made on either the bid tabulation itself or if a change is made in the bidder portal. The bid tabulation provides a seamless and effortless way to keep the lines of communication open between the bid manager and bidders.

Bid tabulation works in conjunction with bid scope. After your bid scope has been defined, you can tabulate the results of all submitted bids from the Bid Tabulation tab. Consequently, this tab is not functional until at least one bid has been submitted. By default, the bid tabulation can't be opened until after the bid due date, however there is a setting in the account setup that will enable the bid tabulation to be opened any time prior to the bid due date for all non-public projects. See Bidding Options for more information.

Upon bid submission, one folder will be created for each bid containing both bid submission custom field information and supporting documentation files. When the bid is submitted, the bid package supporting documents folder will not be visible in the Documents module until the bid tabulation has been opened.

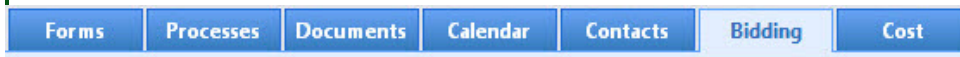
Note: The Bid Tabulation tab is displayed only if bid tabulation has been enabled in the account setup. Contact your e-Builder account administrator if you need access to this feature.

There are a number of customizable features on the bid tabulation tab to meet the unique needs of your particular organization. For instance, you have the ability to adjust totals after negotiating with bidders. If your organization follows a public bid process, you can optionally turn off this capability by clearing the **Allow Adjustments** check box on the Add/Edit Bid Package Details Page. An additional account feature includes the option to require one or more witnesses present before the bid tabulation is opened.

To access the Bid Package Details page from the top navigation menu

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

Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.
The Bid Packages page is displayed.
3. Click the name of a bid package to view the Bid Package Details page.

Adjust Bidder's Values

If this setting is enabled in the bidding details, you are able to adjust the totals received by bidders. After the adjustment is made, the change is reflected in the bidder portal for the bidder to view. When the bidder logs into the bidder portal, adjusted amounts display in red and they are able to view your notes. If your organization follows a public bid process, you can optionally turn off the capability to adjust the totals.

To adjust values

1. Go to the **Bid Package Details** page.
2. Click the **Bid Tabulation** tab.
3. Click the title of the bidder's company.
The Invitation Details page is displayed.
4. Click the **Bid Details** tab.
An Adjust link displays next to each Total Cost value.
5. Click the **Adjust** link next to the total you want to change.
The **Adjust Bid Amount** popup window displays.
6. Enter all required fields.
7. Click **Save**.

Export Submitted Bid Data

Use the Export feature to download submitted bid data such as the base bid, bid summary and bidder qualification notes.

To export data

1. Go to the **Bid Package Details** page.
2. Click the **Bid Tabulation** tab.
3. Click **Export**.
The data is downloaded as an Excel® (.xls) spreadsheet.

Bid Tabulation Page

Additional Actions

- **Show/Hide Filter Toggle:** Click this toggle to show or hide all filter options and make more space on the page for you to view bid details.
- **Filters:** Each check box is a filter option that allows you to see different data on the screen. After selecting check boxes, click **Re-Run** to see the results reflected in the table.
- **Export:** Click this button to export data into an Excel® spreadsheet.
- **Re-Run:** Click this button to refresh the page based on your selected filters. Simply selecting filter check boxes will not display the results in the table below. You have to click the Re-Run button for changes to display.
- **Company Name:** The company name is a clickable link that will take you to the Invitation Details page, from which page you are able to adjust values, if this setting is available on the project.
- **Bid Totals:** This row lists totals for your initial estimate and that of all bidders. This view allows you to easily see totals across the board to simplify the process of comparing bids.

Related Topics:

- Additional Actions in the Bidding Module

Permissions

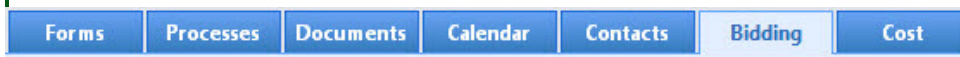
The Permissions tab gives bid managers the opportunity to update permissions directly from the Bidding module instead of having to go to the Setup area. From here you are able to update the permission for roles and individual users.

Note: There are two sections on this page, one for updating role permissions and another for individual users. The same permission settings are available for each group of users.

To access the Bid Package Details page from the top navigation menu

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

Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.
The Bid Packages page is displayed.
3. Click the name of a bid package to view the Bid Package Details page.

To modify permissions for roles or individual users

1. Go to the **Bid Package Details** page.
2. Click the **Permissions** tab.
3. Use the **Filter Roles and Users** section to search for and select a specific role or individual user based on select criteria.

Tip: Select the **Admin Roles Only** check box to filter for administrative roles only.

4. Select one or more check box to apply its permission setting to the role or user:
 - **View Bidding:** This permission setting gives individual users and users the ability to view an entire bid package.
 - **Modify Bidding:** This permission setting gives individual users and users the ability to modify bid package details.
 - **View/ Open Bid Tabulation:** This permission setting gives individual users and users the ability to view and open the bid tabulation.
5. Click **Save Changes**.

Related Topics:

- Additional Actions in the Bidding Module

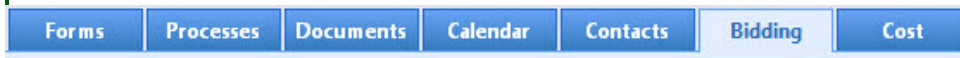
Bid History

Users with View Bidding permissions have the ability to view the bid history log. This makes every facet of the bid process transparent and facilitates a hassle-free auditing process. From the Bid History tab, you are able to see the exact changes of a modified bid package; when the package was created and closed; and a list of potential and invited bidders and their statuses. A history of when the bid tabulation was opened and short listed bidders are also accessible from this page.

To access the Bid Package Details page from the top navigation menu

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

Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.
The Bid Packages page is displayed.
3. Click the name of a bid package to view the Bid Package Details page.

To view the bid history

1. Go to the **Bid Package Details** page.
2. Click on the **Bid History** tab to view it.
3. The following fields are displayed:
 - **Show Filter/ Hide Filter:** The filter is hidden by default. Click the **Show Filter** link to use the inline filter to narrow down the logged bid history actions by user, task, action or description.
 - **User:** Displays the name of the user that took the action.
 - **Date & Time:** Displays the date and time the action was taken.
 - **Task:** Displays the general area in which the action was taken; for example, Invited Bidders, Potential Bidders or Bid Scope Addendum.

- **Action:** Displays the action that was taken.
- **Description:** Displays a description of the action.

Related Topics:

- Additional Actions in the Bidding Module

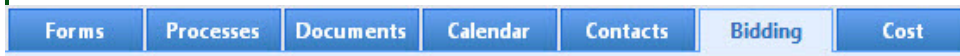
Additional Actions

The Bid Package Details page includes few standard buttons that are repeated on each tab, allowing you to perform some of the most common actions from anywhere in the Bidding module.

To access the Bid Package Details page from the top navigation menu

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

Tip: Use this method if you are not already working in a project.



2. On the Bidding page, choose a project from the **All Projects** menu.
The Bid Packages page is displayed.
3. Click the name of a bid package to view the Bid Package Details page.

Manage Construction Codes

After a bid package is created, the Manage Codes button is displayed by default.

Construction codes are entered by your e-Builder Administrator. These construction codes can be assigned to potential bidders, allowing you to group bidders by construction codes (optional). This makes it easier to find and identify bidders, if their name or contact information is not readily available.

If you do not manage construction codes by the time a potential bidder is invited to bid, the Manage Codes button and feature will no longer be available.

Note: The Manage Codes button is available on every tab of the Bid Package Details page.

To manage construction codes

1. Go to the **Bid Package Details** page.
2. Click **Manage Codes**.
The Manage Construction Codes page is displayed with a list of available construction codes.
3. Select the codes you want to add to the project and then click **Add**.
The selected construction code(s) display in the adjacent box.
4. Click **Save**.

Close Bid Packages

After the bidding process is completed and the bid has been awarded, the bid package can be closed. Once the project bid is closed, the status in the bid package details will change to closed.

Closing the bid package revokes access to the bid package for all invited bidders except for the awarded bidder. When the bid package is closed, bidders who have not been awarded will no longer see the bid package listed when they log into the Bidder Portal. Once the award has been granted, the awarded bidder can potentially be added as a licensed e-Builder user.

Once closed, the bid package can be reopened at a later date if necessary.

This task can be completed by:

- Pre-construction Managers
- Estimating Coordinators

Note: The Close button is available on every tab of the Bid Package Details page.

To close a bid package

1. Go to the **Bid Package Details** page.
2. Click **Close**.
3. Click **Yes, Close the Bidding** to confirm the action.

Send Messages

Sending a message allows you to broadcast a message to all project bid participants. This feature is especially useful when there is an addendum or if you're answering a question that you'd like to share with all Invited Bidders simultaneously. Your company's logo, as saved in e-Builder will automatically be included in all sent messages.

The send message feature is available throughout the Bidding module, on every tab of the Bid Package Details page.

To send a message to bidders

1. Go to the **Bid Package Details** page.
2. Click **Send Message**.
3. Enter the subject of the message in the **Subject** field.
4. Enter your message in the **Message** field.
5. In the **Bidders Selected** section, you can take any of the following actions:
 - To send the message to all invited bidders: Click **Add All Invited**. Proceed to the next step of adding files if required.
 - To send the message to certain contacts: Click **Add** to make your selection(s). The Lookup dialog box is displayed.
 - a. Filter the contact information as required.

Tip

- To send the message to just those bidders that expressed an interest in the project, in the **Bidding Status** section, check only the **Pending** and **Will Bid**

check boxes and then click **Filter**.

- To see all available contacts, do not enter any contact information, and just click **Filter**.
- b. Select the check box next to the contact(s) you wish to add.
 - c. Click **Insert Selected** to add the contacts and return to the **Send Message To Bidders** page.
6. To attach files, click either **Browse e-Builder** or **Browse Computer** in the **Attach File** section.
 7. Click **Send**.

View Message History

Use the Message History feature to view a list of all outbound messages, including invitations to bid and other messages. This feature is available throughout the Bidding module, on every tab of the Bid Package Details page as well.

To view the message history

1. Go to the **Bid Package Details** page.
2. Click **Message History**.
The Message History page is displayed.
3. In the **Messages** section, click the subject of a message to view it.
The Message Details page is displayed. The **Message Body** tab is displayed by default and shows the message that was sent.
4. Click the **Delivery Status** tab to view the status of each message per recipient.

Process Pending Requests

When applicable, the Pending Requests link is displayed in the upper right corner of the Bid Package Details page. Accessing pending requests allows administrators, bid managers and bid contacts to process a bidder's request to bid on a project or to reopen a project bid.

Access requests are generated by those within the bidding community who may have been forwarded the original Invitation to bid or need to gain access to the bid. If a user attempts to request access with someone else's invitation, an email notification will be sent to the bidding contact, the requester, and the originally invited contact (if they have an e-mail address on file).

Requests to reopen the bid package can be made after an initial bid as been submitted; before or after the due date. Administrators have the opportunity to accept or reject these requests from this page

Note: The Pending Requests link is located on every tab of the Bid Package Details page, except for the Bid Tabulation and Permissions tabs.

To accept a bidder's access request

1. Go to the **Bid Package Details** page.
2. Click the **Pending Requests** link.
The Pending Requests page is displayed.

3. Click **Accept**, to accept the request. The Access Request page is displayed with the following options:
 - **Add Contact**: Select this option to add the requester as an Invited Bidder.
 - **Create a New Company**: Select this option to add the requester as a new contact for the company.
 - **Delete Original Invitation**: Select this option to delete the requested bidder's invitation.
4. Click **Continue**.
The Invite Bidders page is displayed where you can send the bidder a formal invitation to bid.
5. Enter all required fields.
6. Click **Send**.

To reject a bidder's access request

1. Go to the **Bid Package Details** page.
2. Click the **Pending Requests** link.
The Pending Requests page is displayed.
3. Click **Reject** to reject the request.
4. Click **Yes, Reject the Request** to confirm.

The fields and buttons located on the Pending Requests page are:

Access Requests Tab

- **Cancel**: Click to return to the Bid Package Details page.
- **Bidding Information**: This section provides details of the bid package.
 - **Project**: The name of the project. Click to open the Project Details page.
 - **Bid Package**: The name of the bid package. Click to open the Bid Details page.
 - **Bid Due Date/Time**: The cutoff date and time for bid submissions.
 - **Bid Time Zone**: The date and time of the bid time zone. The time zone can be modified on the Add/Edit Bid Package Details page.
 - **Status**: Whether the bid package is open or closed.
- **Requests**: This table includes the details of the request. The left column lists the requester's status, such as if they are an invited or new bidder. The requester's message is also listed in this column.
- **Accept**: Click to accept the request to bid.
- **Reject**: Click to reject the request to bid.

Reopen Bid Requests

- **Cancel:** Click to return to the Bid Package Details page.
- **Bidding Information:** This section provides details of the bid package.
 - **Project:** The name of the project. Click to open the Project Details page.
 - **Bid Package:** The name of the bid package. Click to open the Bid Details page.
 - **Bid Due Date/Time:** The cutoff date and time for bid submissions.
 - **Bid Time Zone:** The date and time of the bid time zone. The time zone can be modified on the Add/Edit Bid Package Details page.
 - **Status:** Whether the bid package is open or closed.
- **Requests:** This table includes the details of the request. The left column lists the requester's status, such as if they are an invited or new bidder. The requester's message is also listed in this column.

Related Topics:

- Bid Packages

Assistance for Invited Bidders

When you receive an invitation to bid via email, you can access e-Builder's online bidder portal and respond to the bid package. The bidder portal provides access to the Bid Documents Folders and Bidding Instruction File (if one is used). Invited bidders can take any of the following actions from the bidder's portal:

- Register with e-Builder
- Access the Bid Package
- Entering the Invitation Key
- Review Package Invitation
- Ask Questions/View Responses
- Submit Your Bid Response
- Submit Your Quote

Register with e-Builder

Note: If you previously registered as a bidder in the e-Builder Bid Portal, you do not have to register again. Your Bid Portal credentials can be used for all projects and owners who use the e-Builder Bid Portal.

EXCEPTION: For bidders who are subsequently awarded a contract, the owner (e-Builder customer) may assign you a licensed e-Builder account so that you can participate directly in e-Builder project activities. In this case, your Bid Portal username and password for future bid packages may be changed to match your licensed e-Builder account.

The first time you receive an invitation to bid, you must register with e-Builder and obtain a username and password in order to use the bidder portal. This same username and password can be used to bid on any additional projects for any e-Builder customer that you are invited to bid on.

During the registration you will create a username, receive a temporary password via e-mail, and then change that password.

To register with e-Builder

1. Click the link in the bid request email.

The e-Builder Bid Portal login page is displayed.

Note: To watch a quick video tutorial about the account creation process or to contact e-Builder Technical Support, click **For product support information**.

2. Click **Create Account**.
3. On the **Create Account** registration page, complete all required fields.
4. Click **Register**.

A temporary password is sent to your email address. If you do not receive the password within 10 minutes of registering, check your Spam or Junk folder. If the message has still not been received, contact e-Builder Support.

5. Click **Close**.
6. On the e-Builder Bid Portal login page, enter your username and password and click **Login**.
You are prompted to change your temporary password.
7. On the **Change Password** page, enter:
 - **Current password** - The temporary password that you received via email.
 - **Password** - Enter your new password.
 - **Confirm Password** - Re-enter your new password.

8. Select or change your three security questions to answer.
9. Click **Save Password**.

A confirmation message is displayed depending on whether the project is currently open for bidding.

10. Click **Continue** to view the bid packages that you have been invited to.

Access the Bid Package

To access the bid package, ensure that you registered with e-Builder. After registering, you will have a username and password that will allow you to login to the bidder portal and access the bid package.

Note: If you do not see the bid package you are expecting, enter the invitation key from the bid invitation email into the field at the top of the page. The invitation key is specific to your email address and is case sensitive.

You can also share the invitation key or email link. When others use your key or link, e-Builder will send a request for access to the bid manager and will notify you that the key was used by your colleague.

To access the bid package

1. Click the link in the bid request email.
The e-Builder Bid Portal login page is displayed.
2. Enter your username and password.

The Bid Package page is displayed. This page lists all the bid packages that you've been invited to and groups them into three sub-tabs:

- Not Accepted
- Unsubmitted
- Submitted

On the sub-tabs, the bid packages are grouped by Bid Due Date into the following statuses:

- Open
- Not Open
- Expired

Note: The Bid Package page displays bid packages that you have been invited to across all e-Builder customer accounts. This page also includes the Project Name beside the Bid Package Name. When bid packages are within 48 hours of the due date, they are marked as "Expiring". The Bid Manager will periodically close bid packages, at which time they will no longer display on the Bidder Portal at all.

3. Click **Bid Archives** to view the bids that have been archived.

The bid packages are grouped by the following statuses:

- Not Awarded
- Awarded
- Declined

4. Click the name of the bid package you want to access.
The bid package details page is displayed.

Enter the Invitation Key

The invitation key is specific to your email address and is case sensitive. If you do not see the bid package that you were invited to bid on, enter your invitation key.

To enter the invitation key

1. Locate the invitation key in your email.
2. On the Bid Packages page, enter the invitation key in the Invitation Key field, which is located at the top of the page. Click the blue arrow to submit.

If you enter an invitation key that was sent to another person, you will be prompted to request bid package access from the bid manager. Once access has been granted by the bid manager, you will receive an email notification. The person who originally received the invitation key will also receive an email notifying them that you now have access.

Note: If you accidentally created more than one user name for yourself, you may be prompted to request bid access. Contact e-Builder Support for assistance at 888-288-5717.



Review Package Invitation

The Bid Package view contains key package information at the top of the screen.

- **Title:** The e-Builder customer account name, project name, and bid package name are listed at the top of the page
- **Status:** Displays whether the package is Open or Closed, whether you have accepted or declined the bid, and whether you have submitted a response yet.
- **Timeframe:** Displays how much time is left before the bid due date / time, and the bidding time zone.
- **Summary:** Displays the current financial total of your bid response.

The Package Invitation tab contains the following descriptive information published by the bid manager:

- **Bid Info:** The information on this tab varies depending on what the bid manager decided to fill out. Bid package description, contact person, pre-bid meeting details and bid instruction documentation are some of the items that may be included.
- **Invitation Documents:** Drawings, specifications and other documentation for the bid are published here. The file/folder name, the version and the date/time it was uploaded are also displayed on this tab.

Tip: To download a file or folder, click  beside the file name. To download all the files and sub-folders in a folder, click  beside the folder name. A folder containing multiple sub-folders or files will be automatically downloaded as a .zip file. A confirmation message will be displayed if the download is successful.

Note: This feature will not be available if the Invitation Document folder provided to you does not have a file for download.

- **Addenda:** If addenda are published for the bid package, the documentation will be listed here. Prior to submitting your response, you will be required to acknowledge your receipt of every addendum with a check mark on the Additional Information tab. If addenda are published after you have submitted a bid response, your bid will be set back to Draft status and you will need to resubmit your response.

When you decide whether you will bid on this project, you can notify the organization of your intentions.

To accept / decline the invitation to bid

1. Access the bid package.
The Package Invitation tab is displayed.
2. To accept or decline the invitation, click **Accept** or **Decline**.

In the Status box, the **Bidding** field is updated to either Will Bid or Will Not Bid.


Ask Questions / View Responses

Questions for the bid manager may come up during the bid process . Using the Q&A Board tab, you can submit questions, receive responses, view questions submitted by other bidders, and view the responses to those questions.

Note: Bidder names are kept confidential. Viewers are only able to see the questions that have been submitted by another bidder, but their names remain anonymous.

To ask questions or review responses

1. Access the bid package.
2. Click the Q&A Board tab located to the right of the page.

Note: Questions are listed numerically with the most recent question at the top. To view a question and answer, click .

3. To ask a question, click **Submit Question**.
4. On the **Submit Question** dialog box, enter the subject and question.
5. Click **Submit Question**.

When the bid manager answers the question, you will receive an email notification, and your question will be bolded until you have clicked on the question and read the answer. If the bid manager subsequently updates the answer, the question will again be bolded until you read it.

Depending on the content of the question, the bid manager may provide the answer to just you or may share with all bidders. Other bidders will see “Another bidder” in the Questionee column, and not your name.

Tip: Click **View All** to see all questions. To export the data to a spreadsheet for printing, click **Export**.

Submit Your Bid Response

After reviewing the bid package invitation, use the Response Form tab to submit your bid response.


To submit your bid



1. Access the bid package.
2. Click the **Response Form** tab.
3. On the **Step 1: Bid Form** tab, enter your pricing on the bid form line items.

Ensure that you provide pricing at the level of detail required by the bid manager. Some line items may be lump sum, and others may require quantities and unit prices.

Tip:

- If there are areas that do not pertain to your trade, enter a zero (0) value in that line.
- The Summary box at the top of the page maintains a running total of your entries for reference.

4. Click  (Save) and ensure that your work is saved periodically.

Tip: (Optional) To export the bid items to a spreadsheet that you can customize or that you can share with your team, click  (Download). After updating the spreadsheet, click  (Upload) to re-import it.


5. On the **STEP 2: Response Documents** tab, click **Attach Documents**, and upload any supporting document needed to support your bid. Any Bid Submission custom fields that have been setup for your account will also be displayed here.
All uploaded documents will be displayed in a table at the bottom of the tab for you to review.
6. On the **STEP 3: Additional Required Info** tab, complete any additional questions or qualification statements that have been established by the bid manager. When available, the custom fields set up for

your account will be displayed on this tab. If any addenda have been issued, you are required to acknowledge receipt of the addenda on this page before submitting your bid.

7. Review the entire Response Form and click **Submit**.
8. When prompted, enter your e-Builder portal password and click **Submit Bid**.

The date and time that you submitted your bid is stamped on your Response Form. You will also receive an email confirmation.

Additional Notes

- After the bid due date/ time has passed, the Submit button will be disabled. In some circumstances, the bid manager may allow late submissions and the button will continue to be enabled.
- If the bid manager adds or changes a bid item, or publishes an addenda, your bid will be set back to a Draft status. You will receive an email notification and will be required to reconfirm your bid and resubmit.
- When you need to step away from entering the quote, click  (Save). It is recommended that you save every 15 minutes. This will ensure that your changes are saved.
- If there are areas that do not pertain to your trade, enter a zero (0) value in that line item.
- If you have your qualifications in Word® or another program, copy and paste them into the qualifications.
- It is required that you acknowledge all the addenda, even if they do not pertain to your trade.
- It is recommended that you submit your quote at least 15 minutes before the due time so that you can rectify any errors. To submit the quote, you must complete all the fields and acknowledge the addenda items.
- Upon bid submission, a folder will be created for the bid containing all files from both bid submission custom fields and supporting documentation in the Bid Tab. The folder will be visible in the Documents module after the bid tabulation is opened.

Recall your Bid Response

After submitting a bid, you can make changes to your bid before the due date/time without any interaction from the bid manager. The bid manager has no record of your bid response until you click Submit again.

To recall your bid response

1. On the **Response Form** tab, click **Recall Bid**.
2. Optionally provide a reason for your recall and then click **Yes, I am sure**.
Your previous submission information is displayed on the Response Form tab.
3. Click **Submit** to resubmit your bid prior to the bid due date/time.

Submit a Quote

The bid manager may set up the bid package to only accept quote documentation, such as for initial pre-qualification bids. In this situation, the Response Form does not have any sub-tabs, and you will upload a file containing your response instead of entering line item pricing.

Note: If the bidder needs to submit a revised quote prior to the bid deadline, use the Submit Quote button and re-upload a new document. The Recall Bid function is not available in this type of bid package.

To submit your quote

1. Access the bid package.
2. Click the name of the bid package you want to access.
3. On the **Response Form** tab, click **Submit Quote**.
4. Upload the required files to the popup window and then click **Continue**.

The date and time that you submitted your bid is stamped on your Response Form. You will also receive an email confirmation.

About the Calendar Module

The e-Builder Calendar module is a project-specific calendar that brings all project participants, both internally and externally together for scheduling in one place. The e-Builder calendar integrates with Microsoft Outlook, and automatically syncs your e-Builder calendar events to your Outlook Calendar. If your project team consists of multiple companies using multiple calendars, e-Builder manages events by allowing you to invite your e-Builder users and contacts as well as external users and then tracking attendance, meeting minutes, and progress on resulting action items.

Need to see the big picture? With the e-Builder calendar module you can see your events, invited events, and public events across all of your projects all in one view. Better yet, at a glance you can see your agenda for the next 30 days. Set up reoccurring weekly status meetings, create automatic reminder notifications, update the attendance, and instantly bring up anything on your calendar with the built-in search tool.

Key Concepts of the Calendar Module

e-Builder is an integrated project management and collaboration system for the construction industry. The e-Builder calendar module provides a place to store important meeting dates in one location for everyone to access. Before you start using the e-Builder calendar module you should familiarize yourself with some key concepts used throughout this section.

Project

Most everything in e-Builder takes place within the context of a project. Projects in e-Builder refer to the various projects that you are participating in. Each real world project is associated with a project in e-Builder. If you are working on the real world project, then you can be added as a member of the project in e-Builder. Your Project Administrator or Manager will be able to add you as a member of a project in e-Builder.

Event

The e-Builder calendar module is a system for naming periods of time, known as calendar events. Each event created in e-Builder is a meeting, or gathering of individuals who meet at a pre-arranged place and time in order to discuss or engage in business matters. Invitations can be sent out to e-Builder users, contacts, and non e-Builder users.

Contact

In order to invite a contact to a calendar event you must have the person created as a contact first. Each contact invited must have an email address. It is important to mention that a contact is different than a standard e-Builder user. An e-Builder user is someone that has been added to the e-Builder account as a participant to a set of your projects. An e-Builder contact is a record of contact information (such as phone number, fax, email address, street address, etc.) associated with an e-Builder Company. These contacts do not have access to all of your e-Builder project information; only the calendar event that the contact is invited to.

Access the Calendar Module

Note: Upcoming calendar events display in the Calendar section located on the right side of the Home page.

There are two methods of accessing the Calendar module. The first 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 way to access the Calendar module is from the project menu - this will help you avoid reselecting your project.

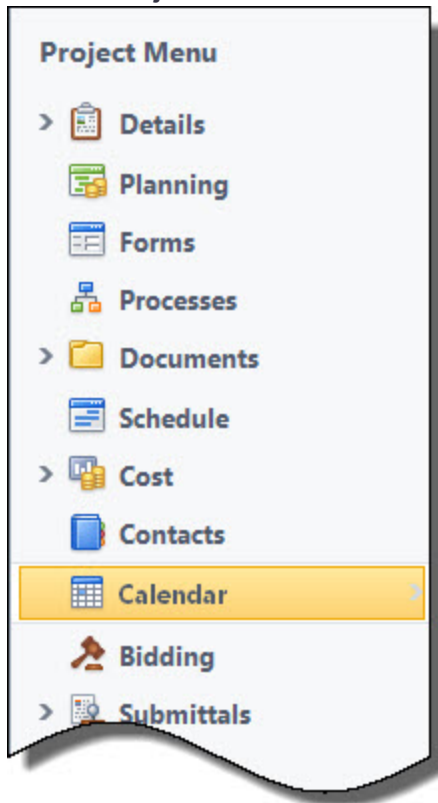
From the Top Navigation Tabs

1. Click the **Calendar** tab located at the top of the page.
2. Click the **All Projects** drop-down menu and select your project. The Project Calendar page is displayed.

From the Project Menu

If you are already within a project, you can access the Calendar module via the Project Menu located in the left navigation bar.

- Click the **Project Calendar** link. The Project Calendar page is displayed.



Access Event Details Page

To access the Event Details page

1. Go to the Calendar module.
For more information see Access the Calendar module.
2. Click the title of the event to open the Event Details page.
3. If there are multiple meetings available, click the **Meeting Number** drop-down arrow to make the appro-

priate selection.

Event Details

Event Overview Delete Occurrence Delete Series

Project Calendar: eB Construction
Project Number:
Subject: OAC Weekly Status Update
Meeting Type: Owner, Architect, Contractor
Meeting Number: 7

Meeting Number	Date	Subject
4	12/22/2011 1:30:00 PM	OAC Weekly Status Update
5	12/13/2012 1:30:00 PM	OAC Weekly Status Update
6	12/13/2012 11:30:00 AM	OAC Weekly Status Update
7	2/14/2013 1:30:00 PM	OAC Weekly Status Update
8	2/28/2013 11:30:00 AM	OAC Weekly Status Update

Reminder:
Privacy: A total of 8 items

Calendar Views

Calendar views offer a quick and easy way to see customized views of the calendar with just one click. By default, an All Events calendar view and a My Event calendar view is available. The All Event calendar view allows you to add account calendar events. You can also customize your view with a number of event and project details such as city, project name and project status, just to name a few.

Create My Events Calendar View

The My Events calendar view gives you quick and easy access to just those meeting that you are a participant of.

To create a My Event calendar view

1. Click the **Calendar** tab located on the Top Navigation Tabs.
2. Click the **Add View** link. The Add View page is displayed.

Calendar

My Events Edit Add View

3. Enter the name of the view **Name** field.
4. Click the **My Events** radio button.

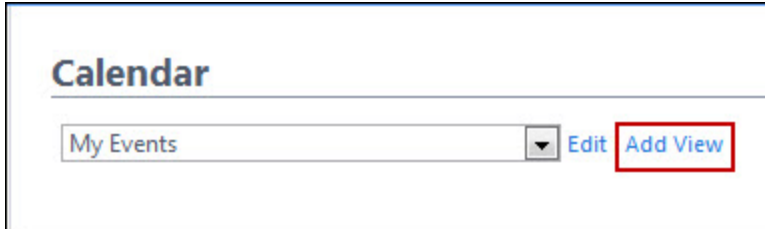
5. Click **Save**.

Create All Events Calendar View

The All Events calendar view is a default option. This view allows you to see all events for every project. From this view you can also add account level calendar events.

To create an All Events calendar view

1. Click the **Calendar** tab located on the Top Navigation Tabs.
2. Click the **Add View** link. The Add View page is displayed.



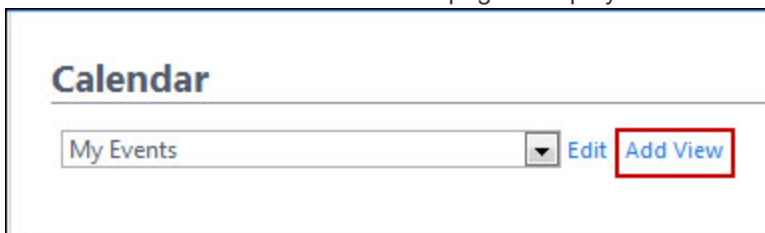
3. Enter the name of the view **Name** field.
4. Click the **All Events** radio button.
5. Click **Save**.

Create a Custom Calendar View

The custom calendar view option is very flexible. You can create a number of custom calendar views to suit your needs. This option allows you to customize your view with a number of event and project details. Filters are available to help you create very specific views such as those for projects of a particular status or type, such as all OAC meetings for projects currently in Design, for example.

To create a custom calendar view

1. Click the **Calendar** tab located on the Top Navigation Tabs.
2. Click the **Add View** link. The Add View page is displayed.



3. Enter the name of the view the **Name** field.
4. To create your custom view based on all events, click the **All Events** radio button. To create your custom view based only on the events you are a participant of, click the **My Events** radio button.
5. Click the **Search Rule #1** drop-down arrow and select an event or project detail by which to choose the first criteria of this custom view.
6. Click the second column drop-down arrow to select a qualifier.

Add View

View Name Save Cancel

* Name: Active Events in Miami

Search Criteria

Search in: All Events My Events

Search Rule #1: City equals Miami and

Search Rule #2: Project Status Lookup and

Search Rule #3: equals and

Search Rule #4: contains and

Search Rule #5: has a value and

Note: In column 3, you can enter multiple items separated by commas (e.g. FL, GA searches for FL or GA) and you can place quotes around data that includes commas (e.g. "10,000" searches for 10,000). For yes/no or on/off fields, "1" equals yes or on, and "0" equals no or off.

Save Cancel

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

Add Events

Events can be added to the general account calendar for all account users to see and access, but they can also be added to the project calendar. In addition, you have the capability to copy events between the general account calendar, project calendars and vice versa, as long as meeting minutes have not yet been entered for the event. Below is a list of procedures for adding calendar events and moving events between the account and project calendars.

- Add Account Calendar Events
- Add Project Calendar Events
- Copy Events Between Calendars

Add Account Calendar Events

Account calendar events are available for everyone on the account to see. To add a project-specific calendar event, see Add Project Events.

If an All Calendar Events view has been created, you will be able to see all events when accessing the main Calendar page. From this Calendar view you are able to add events on an account level, so that everyone on the account is able to see it.

To add an account calendar event

1. Click the **Calendar** tab located on the Top Navigation Tabs.
2. Click the **View** drop-down arrow and select **All Calendar Events**.
For more information on creating calendar views, see Calendar Views.
3. Click **Add Event**.
4. Enter the subject of the meeting in the **Subject** field.
5. In the **Date and Time** fields, click the calendar icons to select a starting and ending date for the meeting.

6. In the **Date and Time** fields, click the time drop-down arrows to select a starting and ending event time.
7. For a single meeting, in the **Repeats** section, select the **One Time** radio button.
—Or—
For recurring meetings, in the **Repeats** section, select the **Daily**, **Weekly**, or **Monthly** radio button. For more information on the fields of the Add Event page, see Add Event Page Overview.
8. Click **Save**.

Add Project Events

To add an event to the project calendar

1. Go to the Calendar module.
For more information, see Access the Calendar Module.
2. Click **Add Event**.
3. Enter the subject of the meeting in the **Subject** field.
4. In the **Date and Time** fields, click the calendar icons to select a starting and ending date for the meeting.
5. In the **Date and Time** fields, click the time drop-down arrows to select a starting and ending event time.
6. For a single meeting, in the **Repeats** section, select the **One Time** radio button.
—Or—
For recurring meetings, in the **Repeats** section, select the **Daily**, **Weekly**, or **Monthly** radio button.
Note: For more information on the fields of the Add Event page, see Add Event Page Overview.
7. Click **Save**.

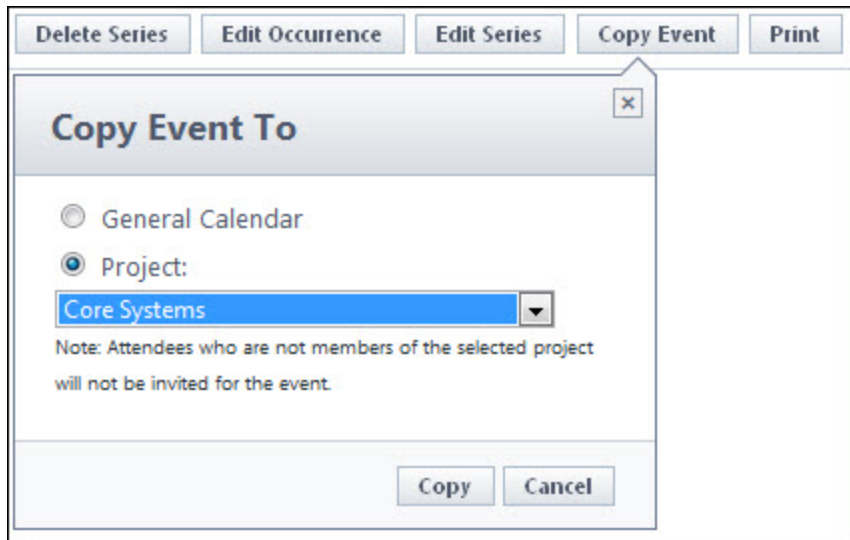
Copy Events Between Calendars

You have the ability to copy events between the general account calendar, project calendars and vice versa, as long as meeting minutes have not yet been entered for the event. This functionality can be useful if the same meeting and meeting details are required across projects or if a meeting was created on the wrong calendar by accident. The ability to copy events saves you the time of imputing duplicate details.

This action can be done by the project organizer or administrator. Once the event is copied over, you can then add meeting minutes. Once meeting minutes have been added, the event CAN NOT be copied between calendars.

To copy events between calendars

1. Click the **Calendar** tab located on the Top Navigation Tabs.
2. To copy an account calendar event, click the name of the event located on the calendar.
—Or—
To copy a project specific event, click the **Go to Project Calendar for** drop-down arrow to select the project, and then click the name of the event located on the calendar.
3. Click **Copy Event**.
The Copy Event To submenu displays.



4. Select either the **General Calendar** or **Project** radio button to select the calendar to copy the event to. If you selected Project, click the drop-down arrow to select the project.
5. Click **Copy**.
The Copy Event Event Overview page is displayed for you to update meeting details if necessary.
6. Click **Save**.
The Add a Note page is displayed.
7. *Optional:* You can enter a note.
8. Click **Continue**.

Add Attendees

For all meetings that have occurred in the past, you can add attendees to include individuals who may have attended unexpectedly. This way, they too can be kept abreast of the meeting minutes and action item statuses.

To add attendees

1. Go to the Event Details page.
For more information, see Access Event Details Page.
2. Click the **Attendees** tab.
3. Click **Add Attendee**.
The Add Attendees dialog box displays.
4. Click **Lookup** to search for and add attendees.
The Lookup dialog box displays.
Note: You can also enter user's email addresses in this field, one per line.
5. Filter the contacts you're looking for by entering requested information.

Note: To see all users and contacts, click Filter without entering any information.

6. Select the check box next to the user(s) you want to add.
7. Click **Insert Selected**.
The Add Attendees dialog box displays.
8. Click **Save**.

Update Attendance

Updating attendance allows you to record whether or not an attendee was present at the meeting. If an attendee was not on the original attendee list, they must first be added, and then their attendance can be updated. For more information, see Add Attendees.

To update attendance

1. Go to the Event Details page.
For more information, see Access Event Details Page.
2. Click the **Attendees** tab.
3. Click **Update Attendance**.
The Update Attendance page displays.
4. Select the check box in the Attended column to record attendance.
Leave the check box empty to indicate attendee absence.
5. Click **Save**.

Add Notes

The Notes tab allows users to quickly add notes of importance. Notes allow all team members who have the permission to see the communication. For each note entered, the first and last name and company name of the user will be displayed along with the date. Contained within the tab, in parenthesis, e-Builder displays the total number of notes created.

To add notes

1. On the **Notes** tab, click **Add**.
The Add Note page is displayed.
2. Enter the note in the **Note** field.
3. If the **Private** check box is available, you can select it to hide your note from other team members.
4. Click **Save**.

View Attached Documents

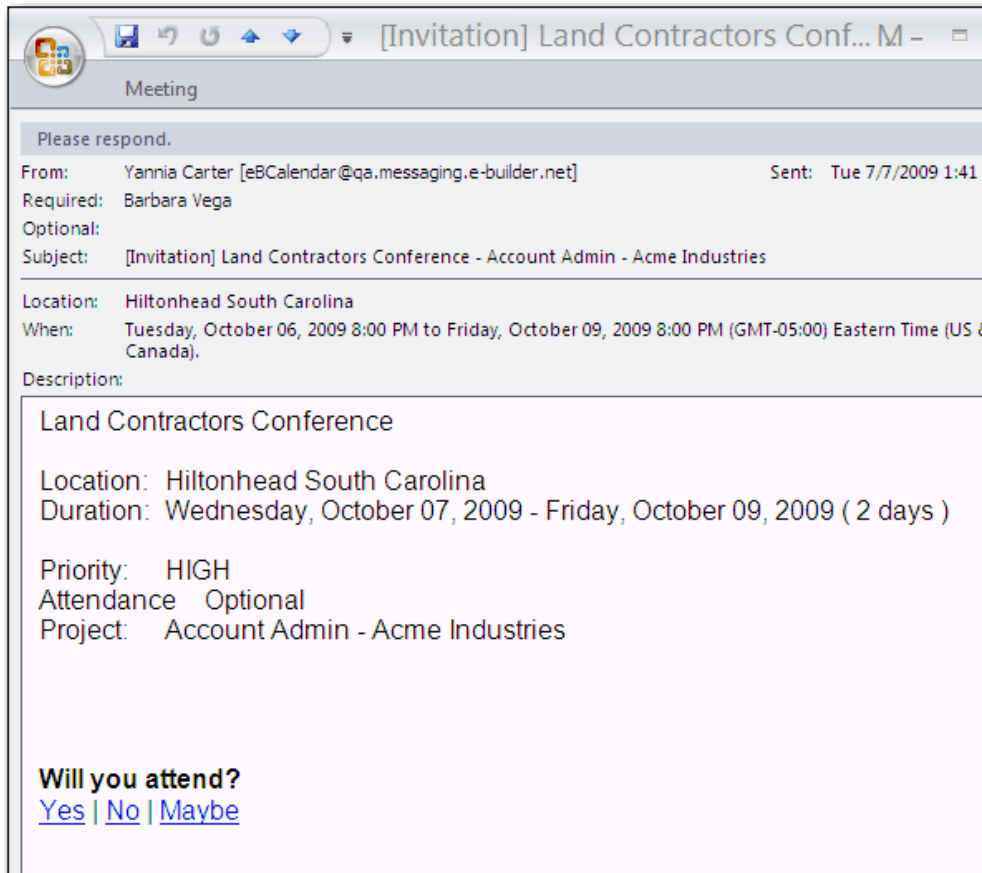
From the Documents tab you can view, download and redline documents that have been attached to the event during the event creation process.

To view, download or redline documents

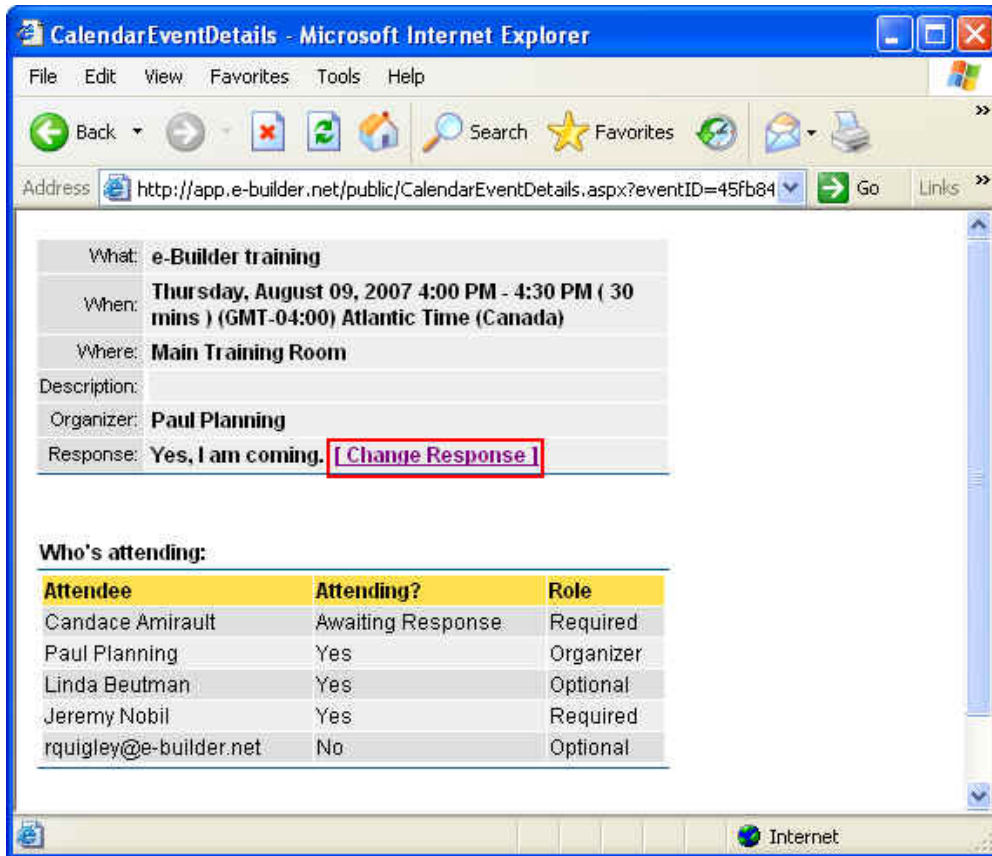
1. Go to the Event Details page.
For more information, see Access Event Details Page.
2. Click the **Documents** tab.
3. Click:
 - a. View
 - b. Download
 - c. Redline

Attendee Invitation

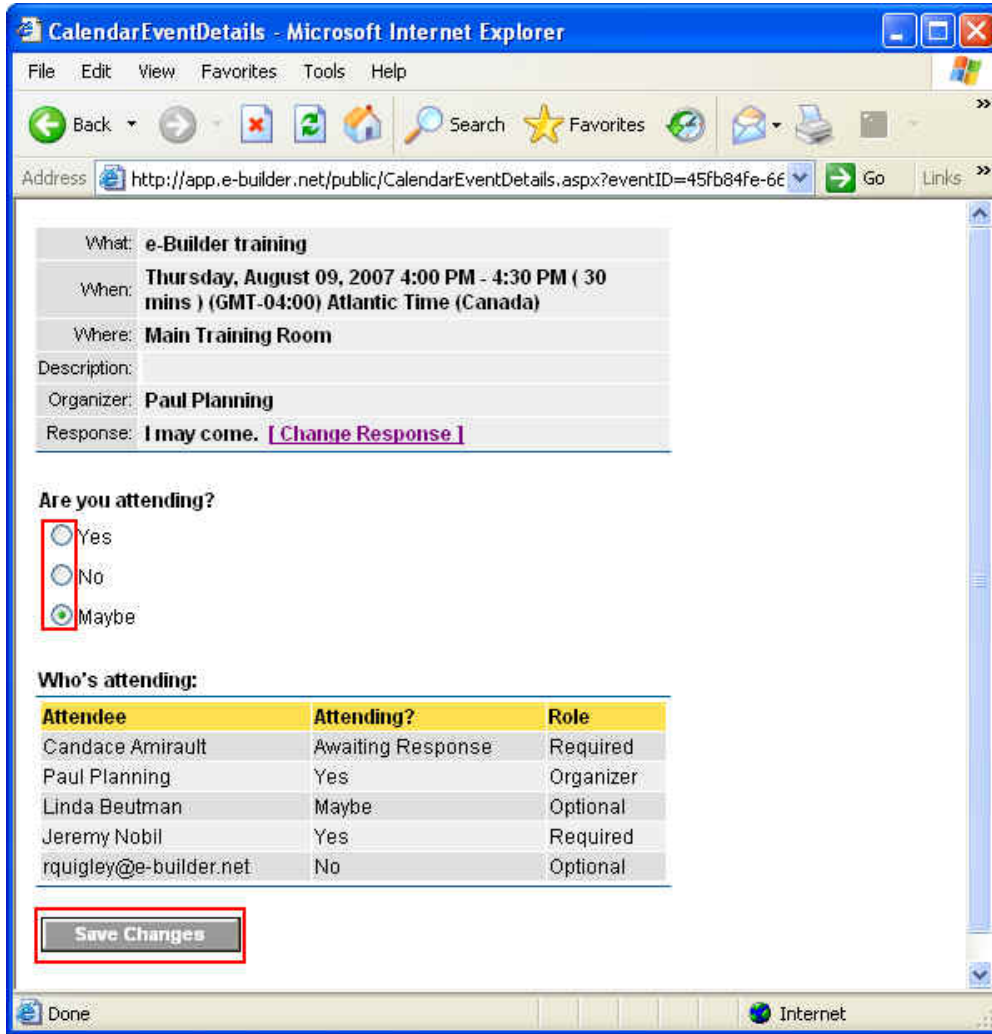
The invited parties to a calendar event receive an e-mail with a meeting request and can indicate whether or not they intend to attend the event. After they make their selection their status is automatically updated in e-Builder. The e-mail will indicate if they are required or optional. They can then click the Yes, No, or Maybe links. (They do not have to use Outlook to be able to push the links at the bottom; they are not specific to Outlook.)



When the user selects a response (Yes, No, Maybe), a new window opens allowing them to review their response. The user can update their response by clicking on the **Change Response** link.



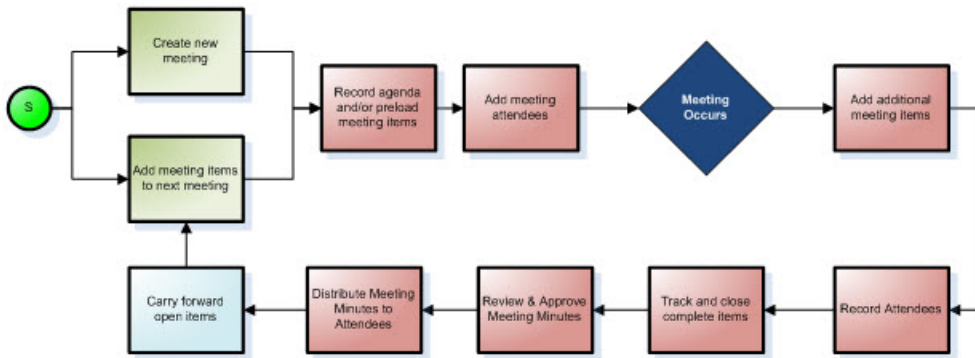
After clicking on the Response link users are able to make their new selection, and then click **Save Changes** to update their status.



Note: There is a limit of 500 rows (representing attendees invited), for system speed and efficiency.

Meeting Minutes

The Meeting Minutes component allows the minute taker to record discussion topics within e-Builder. The review and approval mechanism ensures that all participants agree with notes and action items before minutes are published. Optionally, you can assign action items using an assigned form type. Action items are updated in real time, so all participants are aware of item status before the next meeting. The Meeting Minutes component also gives you the ability to carry open items forward from previous meetings, allowing you to keep track of your progress. The diagram below illustrates how meeting minutes can be used.



Add Meeting Minutes

To add meeting minutes

1. Go to the Event Details page.
For more information, see [Access Event Details Page](#). The Meeting Items tab is automatically selected.
2. Click the **Meeting Type** drop-down arrow and select the meeting type.
Note: The **Meeting Number** field automatically defaults to the next available number for the selected meeting type, but you can also enter a meeting number.
3. Click **Save**.
4. Click the **Topic** drop-down arrow to select a topic or enter free form text in this field.
5. In the **Discussion** area, enter the topic discussion.
6. Click the **Add** link located left of the Topic column.

Carry Open Items Forward

Carrying open items into the subsequent meeting minutes allows you to keep track of action items. Please be aware that you can only carry items forward for the same meeting type. Additionally, the outstanding minutes must have already been published and is currently in Open status.

To carry open items forward

1. Go to the Event Details page.
For more information, see [Access Event Details Page](#).
2. Click **Add Open Items**.
3. Select the check box next to the item(s) you want to carry forward.
4. Click **Carry Forward**.

Add Action Items

Action items can be added to meeting minutes for transparency into required actions and responsible parties. Action items are updated in real time. Once the form is filled out and posted by the assigned individual, the status will automatically update in the meeting minutes for all event attendees to see.

The e-Builder Administrator can specify a form type to be used as an action item whenever needed. This type of form is considered an existing action item. The minute taker can however choose a new action item/form to add as well. The following procedures are included below:

- Add an Existing Action Item
- Add a New Action Item

Note: Action items can only be added to the most recent meeting. Otherwise, the option is not available.

To add an existing action item

1. Go to the Event Details page.
For more information, see Access Event Details Page.
2. Click the **Existing** link in the **Action Req.** column.
The Attach Forms from [Account Name] page is displayed.
3. Click the **Type of Form** drop-down arrow and select a form type.
4. Select the check box next to the form(s) you want to add.
5. Click **Attach**.

To add a new action item

1. Go to the Event Details page.
For more information, see Access Event Details Page.
2. Click the **New** link in the **Action Req.** column.
The Fill Out Form page is displayed.
3. Click the **Type of Form** drop-down arrow and select a form type.
4. Enter all required fields.
5. Click **Post Form**.

Publish Meeting Minutes

Publishing meeting minutes makes them available to all attendees when they access the Calendar module. You will no longer be able to edit the meeting minutes once they are published, but you will still be able to modify meeting status.

To publish meeting minutes

1. Go to the Event Details page.
For more information, see Access Event Details Page.
2. Click **Publish**.
You are prompted for confirmation.
3. Click **OK**.

Send Meeting Minutes

Meeting minutes are typically sent to all attendees and stakeholders at the close of each meeting. Anyone with the ability to manage meeting minutes, based on the setting in the event details, is able to send the minutes. Before finalizing your meeting minutes, you may have to carry open items forward, in order to keep track of action items. Additionally, you might consider using a mail merge template to help include system data without any manual effort. A default mail merge template is available and selected by default, but it can be customized; see [Add New Calendar Templates](#) for more information.

Tip

In the event an internet connection is unavailable, you can always copy and paste into the e-Builder text editor from a text file, such as Microsoft® Word or OneNote®.

To send meeting minutes via email

1. Go to the Event Details page.

For Instructions, see [Access Event Details Page](#).

Note: You can optionally carry open items forward for a previous meeting.

2. Click **Send Meeting Minutes**.

The Send Meeting Minutes window appears.

3. Complete all required fields.

Tip

e-Builder users and contacts will auto-fill as you begin to type their name or email address in the **To** field.

4. Click **Send**.

Related Topics:

- [Add/Edit Event Page Overview](#)
- [Carry Open Items Forward](#)
- [Add New Calendar Templates](#)
- [Customize Calendar Template with Field Mappings](#)

Attach Documents

Documents can only be added to an existing action item. The paper clip icon that allows you to add a document does not appear until the action item is added. For more information, see [Add Action Items](#).

Tip

In IE10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise.

To attach documents to an action item

1. Go to the Event Details page.

For more information, see [Access Event Details Page](#).

2. Click the paper clip icon.
The Attach Documents dialog box displays.
3. Click **Add**.
The Attach Documents dialog box displays.
4. In the **Select Attachment Method** section, select your method of attachment.
5. Click **Browse For Files...**
6. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
7. If you are attaching files from e-Builder, go to step 9.
—Or—
If you are uploading files from your computer, in the **Select an e-Builder Destination folder**, click **Browse**.
8. Search for and select the e-Builder destination folder.
9. Click **Attach Selected**.

Project Calendar Page Overview

Fields and Buttons

The fields and buttons located on this page are:

- **Calendar For [Project Name]**: Click this drop-down arrow to select a different project calendar to view.
- **Month**: Click this tab to view the entire month.
- **Week**: Click this tab to view the entire week.
- **Work Week**: Click this tab to view the entire work week. The days that comprise the work week are assigned in the Administration Tools section.
- **Day**: Click this tab to view the current day.
- **Upcoming Events**: Click this tab to view all upcoming events for the next 30 days.
- **Today**: Click this link to view the present day.
- **Print**: Click this link to print the calendar in the selected view.
- **Add Event**: Click this button to add an event to the calendar.
- **Left Arrows**: Click these arrows to view the previous month.
- **Right Arrows**: Click these arrows to view the following month.

Add/ Edit Event Page

The Add Event page is displayed when you click the Add Event button located on the Project Calendar page.

Fields and Buttons

The fields and buttons located on this page are:

- **Project Calendar**: By default this field displays the event type you've selected (account calendar event or project calendar event). Click the drop-down arrow to switch between calendar types or projects.

- **Subject:** Enter the subject of the meeting in this field.
- **Meeting Type:** Click the drop-down arrow to select a meeting type from the list. Meeting types can be edited in the Administration Tools section by your e-Builder administrator.
- **All Day Event?:** Click this check box to make this an all day event. This will effectively remove the time drop-down arrows from the Date and Time field below it.
- **Date and Time:** Click the calendar icons to select a start and ending date for the event. Click the time drop-down arrows to select a starting and ending time.
- **Repeats:**
 - **One Time** Select this radio button if you are scheduling a onetime event.
 - **Daily** Select this radio button if the event occurs daily.
 - **Weekly** Select this button if the event occurs on a weekly basis.
 - **Monthly** Select this button if the event occurs monthly.
- **Location:** Click the drop-down arrow to select a meeting location. The adjacent field will automatically populate with the description if it was added in the location setup.
- **Agenda / Description:** Enter the agenda or an event description.
- **Reminder:** Click the drop-down arrow to select a reminder time.
- **Privacy:** Select **Private** to grant only meeting attendees to ability to see this event. Select **Public** to make the event viewable by everyone on the project, even if not invited to the event.
- **Required Attendees:** Enter the email address of all required attendees. Click **Lookup** to search for users and contacts that are already saved in e-Builder.
- **Optional Attendees:** Enter the email address of all optional attendees. Click **Lookup** to search for users and contacts that are already saved in e-Builder.
- **Attendees Who Can Manage Meeting Minutes:** Enter the email address of attendees that are able to manage meeting minutes.
- **Priority:** Click this drop-down arrow to set an event priority. Select from High, Normal, and Low.
- **Custom Fields Tab:** If applicable, click the Custom Fields tab to complete all custom fields.
- **Documents Tab:** Click the Documents tab to attach documents to the event. Event participants have access to attached documents and are able to view, download and redline documents. From here you can also remove attached documents.
- **Forms Tab:** Click the Forms tab to attach forms for participants to complete or view. From here you can also remove attached forms.
- **Processes Tab:** Click the Processes tab to attach processes to the event as a form of reference. From here you can also remove attached processes.

Event Details Page

The Events Details page allows you to view and edit event details. From the Meeting Items tab you can also take a number of actions regarding meeting minutes, such as the following:

- Send Meeting Minutes
- Carry Open Items Forward

Fields and Buttons

The fields and buttons located on this page are:

- **Event Overview:** This section provides an overview of the event. Click Edit Series or Edit Occurrence to modify any of the details listed. Click the **Meeting Number** drop-down arrow to jump to another meeting of the same meeting type.
- **Delete Occurrence:** Click to delete the meeting occurrence.
- **Delete Series:** Click to delete the meeting series.
- **Edit Occurrence:** Click to modify the details of the occurrence.
- **Edit Series:** Click to modify the details of the series.
- **Copy Event:** Click to copy the event to on the same project calendar or to a different project calendar. Copying events is a quick and easy way to add the same event to another project calendar, or create a similar event without having to input all event details.
- **Print:** Click to print event details.
- **Meeting Numbers:** The numbers in this column represent the meeting number and discussion item. The first number is the meeting number and second is the discussion number. When entering meeting minutes, the meeting number defaults to the next available number in sequence, but users can also define meeting numbers when creating meeting minutes.
- **Show New Business:** Select this check box to view all new business items. New business items are the topics and discussions of the most current meeting.
- **Show Old Business:** Select this check box to view all old business items. Old business items are those topics and discussions of all previous meetings.
- **Topic:** Click the Topic drop-down arrow to filter specific topics on the table.
- **Publish:** Click this button to make meeting minutes available to all attendees when they access the Calendar module. You will no longer be able to edit the meeting minutes once they are published, but you will still be able to modify meeting status.
- **Send Meeting Minutes:** Click this button to send meeting minutes via email. Minutes can be sent to attendees or anyone with a valid email address. For instructions, see Send Meeting Minutes. By default minutes are sent using the default template, but a customized template can be created by an account administrator. For more information, see:
 - Add/Delete Meeting Types
 - Add/Delete Meeting Topics
- **Sent Meeting Minutes:** Click to track emails that have been sent from any given calendar event. Message history details include the sender, recipient, date and time stamp of sent messages, and the number of times a message has been opened. This button is only visible to administrators.
- **Add Open Items:** Click this button to carry open items from a previous meeting to the current list of meeting minutes. For more information, see Carry Open Items Forward.

Related Topics:

- Add Meeting Minutes

Contacts

e-Builder's Contacts module provides a centralized directory of contacts for all of your projects. By storing the information in e-Builder, you are able to report on and view at a glance all of your cost and bidding information for each company and contact. You can also use this information with the Mail Merge feature to automatically merge existing contacts into your defined contract or invoice templates.

The Contacts module ties in with both the Cost and Bidding modules. Each commitment and cost is tied to a company stored in your contacts. In the Bidding module, each bidder is a contact.

Key Concepts of Contacts

The following concepts are used within e-Builder:

- **Project:** Each real world project that your organization is participating in must be associated with a project in e-Builder. Your Project Administrator or Manager will be able to add you as a member of a project in e-Builder if you are working on it.
- **Contact:** An e-Builder contact is a record of contact information (such as phone number, fax, email address, street address, etc.) associated with an e-Builder Company. Contacts can be stored solely as a reference or associated with Bids in the bidding module.
- **Company:** An e-Builder company is a record of contact information (such as phone number, fax, email address, street address, etc.) for a company. There can be more than one contact associated with a company but only one company can be associated with a contact. Companies can be stored solely as a reference or associated with commitments, or costs or bids in the Cost and Bidding modules.
- **Groups:** Setting up a group of people (users and contacts) allows you to consistently send communication to the same collection of people when needed. These groups can be created for personal use or shared with all users.

Access the Contacts Module

e-Builder supports the different team members that are involved in any project. Based on their job function, users may be able to view and/ or edit/ enter Contacts.

Note: The Site Administrator controls who has access to view and edit information in the Contacts Module.

To access the Contacts module

1. From the top navigation tabs, click the **Contacts** tab.
The Contacts tab is displayed with a list of available contacts.
2. To view companies, click the **Companies** tab.
3. To view groups of contacts, click the **Groups** tab.

Search/ Lookup Companies and Contacts

To search and find companies and contacts you can either search through the pages in your view(s) or click the **Lookup** button.

To search for companies and contacts in views

1. Go to Contacts.
2. Click the **Contacts** tab or **Companies** tab. The views display a list of all the contacts or companies.
3. Click the down arrow to the right of the page drop-down list or click the First, Prev, Next and Last links.
 - The First link will direct you to the first page in the view.
 - The Prev link will direct you to the previous page.
 - The Next link will direct you to the next page.
 - The Last link will direct you to the last page in the view.
4. Click the name of a contact or company to view the details. This allows you to continue to filter or click different contacts and not have to close the lookup window.

Import Companies or Contacts

If you have been granted the permission, you can import companies or contacts directly into the Contacts module from a Microsoft Excel spreadsheet (.xls or .xlsx format).

Note: To see this import functionality on your Project Contacts screen, this feature must be enabled. Consult your account administrator for details.

Import File Preparation

- It is recommended that you name each of the column headers in your import file to the same field name for the company or contact in e-Builder. By doing this, the fields will map automatically and save you time on Step 2 of the Import Wizard.
- If you have contact information you wish to import that does not have a company field, you can create that field as a custom field. Custom field values can also be included on the import file.

Tip: For check box type fields, use the following values in the Import Excel file:

- Check box On = 1, Yes, or Y
 - Check box Off = 0, No or N
 - No change = blank
- If your import file has both company and contact information, choose the radio button where each row is a contact. When the import occurs, if the company already exists it on the list it will only import it once.
 - During the Import process, you will need to specify whether you wish to do a new import of contacts/ companies or an update import that updates any existing duplicate records.

Types of Import Processes

There are two types of import processes:

- **New Import:** To perform a new import of contacts/ companies, leave the **Update Duplicates** check box unchecked in the **How is your import file organized?** field.

- **Company:** The import process checks the company numbers from the import file against the existing records in e-Builder. If the number does not exist, then a new company record will be created. Otherwise it will be returned as a duplicate and fail to be included in the import.
- **Contact:** The import process checks the company number, contact first and last name to determine whether the contact already exists.
- **Update Import:** To perform an update import, select the **Update Duplicates** check box in the **How is your import file organized?** field.
 - **Company:** For records where the company number matches, the import process updates the existing record in e-Builder based on field differences, additions and/ or deletions in the import file. If the company number is not found, the process will also verify the company name for matches.

Warning: The company number cannot be updated through the import.
 - **Contact:** For records where the company number, first name and last name match, the import process updates the existing record in e-Builder based on field differences, additions and/ or deletions in the import file.

Warning: The contact's company number, first name and last name cannot be updated through the import.

To import companies or contacts

1. Go to **Contacts**.
2. Click **Import Contacts**. The Import Contacts - Select Import File page is displayed with a 3-step wizard.
3. Complete Step 1 of the Import Wizard - select an import file:
 - a. In the **How is your import file organized?** field, select the appropriate radio button to specify whether each row in your import file is a Company or a Contact.

Note: If you choose the **Contact** option, you will have to perform field mapping selections for both companies and contacts in the next step.
 - b. Select the **Update duplicates** check box to import and update any duplicate or existing records in e-Builder with company or contact name matches.
 - c. In the **Choose Your Import File** section, click **Choose File** to locate your import file.
 - d. Navigate to the folder where the file is located on your local computer or network. Select the file and click **Open**. The import file is now attached.
 - e. Click **Next**. The Import Contacts - Field Mappings page is displayed.
4. Complete Step 2 of the Import Wizard - specify the field mappings:
 - a. For each standard and custom field in e-Builder, click the drop-down arrow and select the column name from the import file to map them to the import file fields.
 - b. Once all fields are mapped correctly, click **Next**. The Import Contacts - Review page is displayed along with a preview of one of the imported records.

5. Complete Step 3 of the Import Wizard - review the import file:
 - a. Validate that the field mapping performed in Step 2 of the Import Wizard is correct.

Tip: If there are any problems with your import file that caused certain rows not to import, you will see a count of the rows with issues on the Exceptions tab. Click the **Exceptions** tab to see the issue and the reason why that row was not imported. It is recommended that you cancel the import if your import file has exceptions to correct the exceptions. Once you cancel the import, correct the rows on the import files that had the errors and re-import the file.


- b. Click **Import**. The Import Contacts - Review page is displayed with a import confirmation message.
6. Click **Finish** to complete the import.


Export Companies or Contacts

If granted the permission, you can export companies or contacts directly from the Contacts module to a Microsoft Excel spreadsheet (.xls format).

Note: Custom field values can also be included in the export file.

To export companies to MS Excel

1. Go to Contacts.
2. Click the **Companies** tab or **Contacts** tab.
3. Click the MS Excel icon . The MS Excel Spreadsheet will be downloaded to your computer.

Tip: To export a list of companies or contacts belonging to a specific project, select a project from the **All Projects** drop-down box first. If you wish to export the details of only few companies or contacts from this list, you can narrow down the list by clicking the check boxes beside the desired companies or contacts and then clicking the MS Excel icon .

Contact Information

Using the Contacts module you can access your companies or contacts. Click the Companies tab to access the list of companies and click the Contacts tab to access the list of contacts.

To filter and search for contacts

1. Go to Contacts.
2. Go to the Contacts tab.
3. Click **Lookup Contact**. The Lookup Contact popup window is displayed.
4. Specify search criteria in the fields.
5. Click **Filter**. The search results are displayed in a grid below the filter.

Tip: If no information is entered in the filter fields, all contacts will be displayed when the **Filter** button is clicked. Click **Clear** to clear the filter criteria entered.

6. Click the name of a contact to display the contact details in the main application window. This allows you to continue to filter or click different contacts and not have to close the lookup window.

To view the contacts for a specific project

1. Go to Contacts.
2. To display a list of contacts for a project, click the **All Projects** drop-down box. A list of projects will be displayed.
3. Select a project by clicking it. The contacts for the project that you have selected are displayed.

Tip: Click letters of the alphabet, located below the filter area, to display contacts/ companies (depending on the page you are in) that begin with that letter.

To view a contact's details

1. Go to Contacts.
2. To view the details of a contact, click the required contact's first or last name from the list of contacts.
3. The Contact Details page is displayed with the information for the contact you have selected.
4. To print the contact information, click **Print**. A new browser window will open up with the Contact's Information. Click the **Print** button in this window and select your printer.

Working with Contacts

e-Builder allows you to add new contacts manually or import them. In cases where you have a new contact with similar information as an existing contact, such as two contacts from the same office of a company, it may be faster to copy an existing contact than to create a new one.

Note: Only users who have been assigned permissions by their e-Builder administrator can add contacts.

To add a contact

Note: Companies and Contacts are also automatically added when bidders are invited and/or awarded, if they are not already in the system. e-Builder provides you with the ease and flexibility of automatically adding the contact, company and associated details to the respective Project Contacts when you invite or award the bidder, to save you time and keystrokes, as well as eliminate duplicate work, reducing margin for error.

1. Go to Contacts.
2. To add a contact to e-Builder, click **Add Contact**.

Note: Only users who have been assigned permissions by their e-Builder administrator can add companies or contacts.

3. On the Add Contact page, enter the contact information.
4. Click **Save**.

Tip: If you have more than one entry to make, click **Save & Add** and you will be able to add another contact.

To edit a contact's details

1. Go to Contacts.
2. Click the required contact's first or last name from the list of contacts.

3. On the Contact Details page, click **Edit**.
4. On the Edit Contact page, make changes to the contact information fields as needed.
5. Click **Save**.

To copy a contact's details

1. Go to Contacts.
2. Click the required contact's first or last name from the list of contacts.
3. On the Contact Details page, click **Copy**.
4. On the Copy Contact page, enter the contact information for the new contact.

Note: The first and last name fields are the only two that do not automatically copy.

5. Click **Save**.

To delete a contact

Note: You cannot delete a delete a contact that has funds committed to it in the cost module, or is a bidder in the bidding module.

1. Go to Contacts.
2. Click the required contact's first or last name from the list of contacts.
3. On the Contact Details page, click **Delete**. You will be asked to confirm the deletion.
4. Click **Yes, Delete the Contact** to confirm.

Add/ Edit Contact Information Fields

- **First Name:** The first name of the contact. This field is required. Choose a prefix for the contact from the drop-down list, if needed.
- **Last Name:** The last name of the contact. This field is required.
- **Company:** The name of the company that the contact is associated with. To chose the company, click the arrow and select a company from the drop-down list. If the company has not been created yet in e-Builder, then it must be entered manually. This field is required.
- **Company Number:** The number of the company that the contact is associated with. When adding
- **Title:** The title for the contact.
- **Department:** The company department that the contact belongs to.
- **Country:** The country where the contact is located.
- **Address:** The first line of the address where the contact is located.
- **Suite:** The suite number, if any, for the contact's location.
- **City:** The city where the contact is located.
- **State/ Province:** The state or province where the contact is located.
- **Zip/ Postal Code:** The postal code for the contact's location.

- **Primary Contact:** Select this check box to make the contact the primary contact for their company. If they are the only contact associated with a company then they are the primary contact by default. Designating a contact as the primary contact will display their name in the primary contact column of the Companies page.
- **Email:** The email address for the contact.
- **Phone:** The phone number for the contact.
- **Mobile Phone:** The mobile phone number for the contact.
- **Other Phone:** Any alternate phone number available for the contact.
- **Fax:** The fax details for the contact.
- **Pager:** The pager details for the contact.
- **Do Not Use?:** When selected, this check box will omit the contact from any bid communications.

Contact Information Buttons

- **Edit:** Click this button to edit the contact details.
- **Delete:** Click this button to delete the contact.
- **Copy:** Click this button to copy the contact.
- **Message History:** Click this button to view the Message History page for the contact.
- **Print:** Click this button to print the contact details.

Add Contact Page Buttons

- **Save & Add:** Click this button to save and create the new contact and then add another new contact.
- **Save:** Click this button to save the changes and create the new contact.
- **Cancel:** Click this button to cancel the changes and clear the fields.

Contact Information Tabs

The following tabs on the Contact Details page contain additional information about the contact:

Note: The tabs for Bid Packages and Messages will only appear if the Bidding Module is turned on. The tabs for Commitments and Actual Costs will only appear if the Cost Module is turned on.

- **Custom Fields:** Displays the contact's information for the custom fields that have been created. If there is a field that needs to be added, please contact your e-Builder Administrator.
- **Invited Projects:** Displays all of the project bids that the contact has been invited to. The Invited Projects grid includes the project name, due date, the current status of the project bid, the bidding status of the company and whether or not a bid has been submitted. Each time the contact is invited to participate in a new project bid, a new row is automatically included in this grid.

Note: Click the drop down arrow in the box to the right of Bidding Status to view bids in a specific status. Click the drop down arrow in the box to the right of Bid Package Status to view either the open or closed project bids.

- **Construction Codes:** Displays which construction codes are assigned. Construction codes are a structured hierarchy of divisions and classification codes within each division that are used to standardize information in the construction industry.

Tip: In e-Builder, construction codes are associated with companies and used for reporting purposes or to invite contacts in the Bidding module. The contacts automatically inherit the construction codes assigned to their company. If you want to manage the codes for this contact, you have to click the company name link and then click the construction codes tab for the company.

- **Notes:** Displays any notes for the contact. To add a note for the contact, click **Add Note**. After entering the note, click **Save** to retain it.
- **Documents:** Displays all of the documents that are associated with the contact (i.e. Insurance papers, pre-qualification letters, warranties). For more details on documents please see About the Documents Module. To attach a document to a contact profile, click **Attach Documents**. Click the drop down arrow and select the project. After selecting the project, you can filter for the document(s) that needs to be attached. You can either load document(s) from your computer or from e-Builder.

Note: If you are loading documents from your computer you must also select an e-Builder folder to load it to. Click the Browse button to select the desired folder location. Remember, to associate a document to a contact, the file must reside in the document repository of a project.

Tip: Click the Add Files button on the left grid to add files manually (one at a time) from your computer. You can also drag and drop the document(s) into this grid. Click the Add Files button on the right grid to manually add document(s) from the e-Builder document repository for the project. Click the Upload All Files button to load all documents and associate them to the contact.

- **Forms:** Tracks all communications between a vendor, client or consultant.

Tip: To attach a form to a contact/ company profile, click the Attach Forms button. Click the drop down arrow and select the project. After selecting the project, you can filter for the form type that needs to be attached. Click the Attach button.

- **Processes:** Tracks all communications between a vendor, client or consultant.

Tip: To attach a process to a contact profile, Click the Attach Processes button. Click the drop down arrow and select the project. After selecting the project you can filter for the process type that needs to be attached. Click the Attach button.

Company Information

In e-Builder, each company or contact is associated with any project that has costs with that company and/ or contact.

To filter and search for companies

1. Go to Contacts.
2. Go to the Companies tab.
3. Click **Lookup Company**. The Lookup Company popup window is displayed.
4. Specify search criteria in the fields.

5. Click **Filter**. The search results are displayed in a grid below the filter.

Tip: If no information is entered in the filter fields then all companies will be returned when the **Filter** button is clicked. Click **Clear** to clear the filter criteria entered.

6. Click the name of a company to display the company details in the main application window. This allows you to continue to filter or click different companies and not have to close the lookup window.

To view the companies for a specific project

1. Go to Contacts.
2. To display a list of companies for a project, click the **All Projects** drop-down box. A list of projects will be displayed.
3. Select a project by clicking it. The companies for the project that you have selected are displayed.

To view a company's details

1. Go to Contacts.
2. To view the details of a company, click the required company's name from the list of companies.
3. The Company Details page is displayed with the information for the company you have selected.

Working with Companies

e-Builder allows you to add new companies manually or import them. You can also edit and delete a company's details if you have the required access permissions.

To add a company

Note: Companies and Contacts are also automatically added when bidders are invited and/or awarded, if they are not already in the system. e-Builder provides you with the ease and flexibility of automatically adding the contact, company and associated details to the respective Project Contacts when you invite or award the bidder, to save you time and keystrokes, as well as eliminate duplicate work, reducing margin for error.

1. Go to Contacts.
2. To add a company to e-Builder, click **Add Company**.

Note: Only users who have been assigned permissions by their e-Builder administrator can add companies or contacts.

3. On the Add Company page, enter the company information.
4. Click **Save**.

Tip: If you have more than one entry to make, click **Save & Add New** and you will be able to add another company.

To edit a company's details

1. Go to Contacts.
2. To edit a company's details, click the company name listed in the Company Name column on the Contacts or Companies tab.

3. On the Company Details page, click **Edit**.
4. On the Edit Company page, make changes to the company information fields as needed.
5. Click **Save**.

Tip: If there are contacts associated with a company and you edit the address or phone, then you will be given the choice to also update the associated contacts with the same changes. Select the check boxes beside the fields to be updated for the contacts and click **Yes, Update Company and Contacts**. To only update the company, click **No, Update Company Only**.

To delete a company

Note: You cannot delete a company that has funds committed to it in the cost module, or has contacts from the company bidding in the bidding module.

1. Go to Contacts.
2. To edit a company's details, click the company name listed in the Company Name column on the Contacts or Companies tab.
3. On the Company Details page, click **Delete**. You will be asked to confirm the deletion.
4. Click **Yes, Delete the Company** to confirm.

Tip: If you have tried to delete a company that has funds committed to it in the Cost Module, or has contacts from the company bidding in the Bidding Module, you will be unable to do so and will receive an notification message asking you to remove the connections first and then try to delete the company.

Add/ Edit Company Information Fields

- **Company:** The name of the company. This field is required.
- **Country:** The country where the company is located.
- **Address:** The first line of the address where the company is located. Click **view map** to preview the address location using Google Maps.
- **Suite:** The suite number, if any, for the company's location.
- **City:** The city where the company is located.
- **State/ Province:** The state or province where the company is located.
- **County:** The county where the company is located.
- **Zip/ Postal Code:** The postal code for the company's location.
- **Company Number:** Click **Generate** to automatically generate a company number. You must first enter a name for the company in the **Company** field before you use this feature. This field is required.
- **Phone:** The phone number for the company.
- **Fax:** The fax details for the company.
- **Website URL:** The URL of the company's website.
- **Classifications:** The type of business certification or classification that the company qualifies for. The following options are available for selection:

- **WBE:** Women's Business Enterprise
- **MBE:** Minority Business Enterprise
- **DBE:** Disadvantaged Business Enterprise
- **VBE:** Veteran-Owned Business Enterprise
- **SBE:** Small Business Enterprise
- **Other:** Other Business Enterprise types
- **Is Prequalified?:** Pre-qualified is a check box for informational purposes. It can be checked to let other users know that this company has already been qualified for their work.
- **Do Not Use?:** When selected, this check box will omit the company from any bid communications.
- **Active:** Indicates whether the company is currently active.

Company Information Page Buttons

- **Edit:** Click this button to edit the company details.
- **Delete:** Click this button to delete the company.
- **Add Company:** Click this button to add a company.
- **Add Contact:** Click this button to add a contact.
- **Message History:** Click this button to view the Message History page for the company.

Add Company Page Buttons

- **Save:** Click this button to save the changes and create the new company.
- **Save & Add Construction Codes:** Click this button to save and create the new company and then add construction codes.
- **Save & Add New:** Click this button to save and create the new company and then add another new company.
- **Cancel:** Click this button to cancel the changes and clear the fields.

Company Details Tabs

The following tabs on the Company Details page contain additional information about the company:

Note: Based on your viewing privileges, you will be able to access one or more of the above mentioned tabs. If you do not have access, the display for that item/ those items will be blank. The Bidding tab will be displayed only if the Bidding Module has been enabled for the account. The tabs for Commitments and Actual Costs will be displayed only if the Cost Module is enabled.

Tip: Click a tab name to see the information it holds. The number in parentheses indicates the number of entries for the tab.

- **Actual Costs:** Displays all of the actual costs across all projects for the company.

Tip: To view the actual costs for a specific project click the drop-down arrow in the box that shows All Projects and select the name of the project that you want to see the actual costs for. To view the details of an actual cost click the link in the Invoice # column. If there is a commitment associated with the actual cost click the link in the Commitment # column to view its details. You can also add an invoice for the company by clicking the Add Invoice button.

- **Bidding:** Displays the projects on which this company had bid, if any.
- **Commitments:** Displays all of the commitments across all projects for this company.

Tip: To view the commitments for a specific project click the drop down arrow in the box that shows All Projects and select the name of the project that you want to see the commitments for. To view the details of a commitment, click the link in the Commitment Number column.

- **Contacts:** Displays the contacts associated with this company.

Tip: To view the details of a contact click the link in the **Name** column. To send an e-mail to the contact click the link in the **Email** column. To add another contact for the company click **Add Contact** and enter the new contact's information. See Contact Information for more details.

- **Construction Codes:** Displays which construction codes are assigned. Construction codes are a structured hierarchy of divisions and classification codes within each division that are used to standardize information in the construction industry. In e-Builder, they are associated with companies and used for reporting purposes or to invite contacts in the Bidding module.

Note: Each contact associated with the company automatically inherits the construction codes assigned. This benefits you when building out your potential and invited bidder lists. When searching for a code when creating a bidder list only those contacts (in those companies) that have that construction code is returned and eligible to be invited.

Tip: If granted the permission to edit companies, then you can assign construction codes to a company by clicking the **Manage Codes** button on the Construction Codes tab. Click the different codes to filter those results in the left grid, to assist in narrowing down the results. Or simply find the codes you want to assign to the company and click the Add button. When a code or set of codes are added they automatically show in the Selected Construction Codes grid (right grid). Filter for specific descriptions or codes by entering the search in the Filter box. Click the Clear button to clear the search. Click the Save button when you are done and want to save those codes added to the company.

- **Custom Fields:** Displays the company's information for the custom fields that your e-Builder Administrator has created. Please contact them if there is a field that needs to be added.
- **Documents:** Displays all of the documents that are associated with the company (i.e. Insurance papers, pre-qualification letters, warranties). For more details on documents, see Documents. To attach a document to a contact/ company profile, click the Attach Documents button. Click the drop down arrow and select the project. After selecting the project, you can filter for the document(s) that needs to be attached. You can either load document(s) from your computer or from e-Builder. If you are loading documents from your computer you must also select an e-Builder folder to load it to. Click the

Browse button to select the desired folder location. Remember, to associate a document to a company the file must reside in the document repository of a project. Click the Add Files button on the left grid to add files manually (one at a time) from your computer. You can also drag and drop the document(s) into this grid. Click the Add Files button on the right grid to manually add document(s) from the e-Builder document repository for the project. Click the Upload All Files button to load all documents and associate them to the company.

- **Forms:** Displays any forms attached to this company. The Forms tab helps to track all communications between a vendor, client or consultant.

Tip: To attach a form to a contact/ company profile, click the **Attach Forms** button. Click the drop down arrow and select the project. After selecting the project you can filter for the form type that needs to be attached. Click the Attach button.

- **Invited Projects:** Displays all of the project bids that the company has been invited to. For more details on bidding, see Bidding.

Tip: The Invited Projects grid includes the project name, contact invited, the current status of the project bid, the bidding status of the company and whether or not a bid has been submitted. For each time a contact for this company is invited to participate in a new project bid a new row is automatically included in this grid. Click the project name link to route to the project bid. Click the contact name to route to the details of that contact. Use the Bidding Status drop-down box to view bids in a specific status. Use the Status drop-down box to view either the open or closed project bids.

- **Notes:** Displays any notes that have been saved for this company.

Tip: To add a note for the company click **Add Note**. After you have entered the note, click **Save**.

- **Processes:** Displays any processes defined for and attached to this company.
- **Projects:** Displays the projects associated with this company.

Groups

e-Builder allows you to create groups of people (users and contacts) for easy assignments throughout the system.

Setting up a group allows you to consistently send communication to the same collection of people when needed. These groups can be created for personal use or shared with all users.

To access groups

1. From the top navigation tabs, click the **Contacts** tab.
2. To view groups of contacts, click the **Groups** tab. All available groups are displayed.

Groups Tab

From the Contacts module, you can access the Groups tab where groups can be set up, viewed, and edited.

To create a group

1. From the top navigation tabs, click the **Contacts** tab.
2. To view groups of contacts, click the **Groups** tab.

3. Click **Add**.
4. On the Add Group page, complete all the necessary fields:
 - **Choose Name:** Enter a name for the group. This field is required.
 - **Group ID:** Enter a unique identifier for the group. While more than one group can have the same name, the ID must be unique. This field is required.
 - **Description:** Enter a description for the group.
 - **Available:** From this drop-down list, select the projects that the group is available for.
 - **Privacy:** Select who can view the group.
 - **Add Members:** Specify the members to be assigned to the group. Click **Lookup** to access the Lookup window where you can view a list of all the contacts and users.
 - Here, you can select multiple people from the list to add to the group.
 - You can also narrow down the results by entering data into the fields or by selecting the **Users Only** or **Contacts Only** check boxes at the top of the page.
 - You can also leave all filtering blank to display all options. Click **Filter** to populate the list.
 - | **Note:** The list will not populate until the **Filter** button has been clicked.
 - Select the members to add to the group and select **Insert Selected**.
 - | **Note:** Members without email addresses will not be displayed on the group list.
5. Click **Save**. The group will be created and will be displayed on the **Groups** tab.

To edit a group

1. From the top navigation tabs, click the **Contacts** tab.
2. To view groups of contacts, click the **Groups** tab.
3. Click **Edit** beside the group you wish to modify.
4. On the Edit Group page, complete all the necessary fields:
 - **Choose Name:** The name for the group. This field is required.
 - **Group ID:** A unique identifier for the group. While more than one group can have the same name, the ID must be unique. This field is required.
 - **Description:** A description for the group.
 - **Available:** The projects that the group is available for.
 - **Privacy:** The visibility of the group to other users.
 - **Add Members:** Specify the members to be assigned to the group. Click **Lookup** to access the Lookup window where you can view a list of all the contacts and users.
 - Here, you can select multiple people from the list to add to the group.
 - You can also narrow down the results by entering data into the fields or by selecting the **Users Only** or **Contacts Only** check boxes at the top of the page.
 - You can also leave all filtering blank to display all options. Click **Filter** to populate the list.

Note: The list will not populate until the **Filter** button has been clicked.

- Select the members to add to the group and select **Insert Selected**.

Note: Members without email addresses will not be displayed on the group list.

5. In the Members section, click **Remove** beside the name of any member you wish to remove from the group.
6. Click **Save**. The group will be updated with your changes.

To delete a group

1. From the top navigation tabs, click the **Contacts** tab.
2. To view groups of contacts, click the **Groups** tab.
3. Click **Delete** beside the group you wish to delete.

Note: Deletion is only available on groups that you have created. Admin set up groups will be read-only for users who are not administrators.

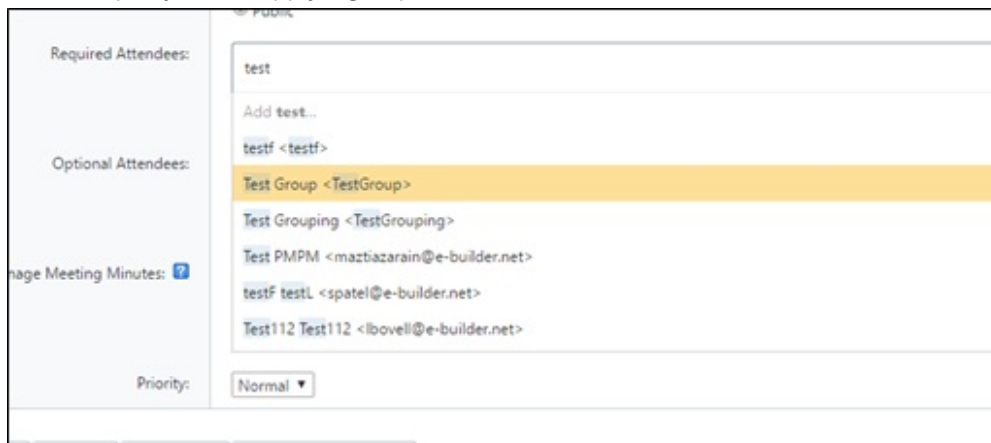
4. You will be asked to confirm the deletion. Click **Yes** to proceed with permanently deleting the group.

Apply a Group

Groups can be applied to multiple places: Calendar Events, Process Instances, Recipients of Reports, Submittals, and other communications throughout the software.

Enter the name or part of the name in the recipient field (where permitted) and then the group name will be populated in the list.

For example, you can apply a group to a Calendar event.



About the Cost Module

The e-Builder Cost module facilitates the cost management process for owner participants, as well as external program participants that are involved in the finances of the program and its individual projects. It standardizes the tracking of costs across an entire program including income collected in funding sources, budget changes,

commitment changes, and actual costs.

The capabilities of this module streamline the cost management process between all parties while reducing the effort, time, and cost associated with the typical manual process. Actions throughout this module are permissions based, therefore some data and actions are restricted from users that do not have the appropriate permission to view or take specific actions. If you do not see features or data that you think you should have access to, contact your account administrator so they can adjust your cost permissions accordingly.

Key Concepts

Before you start using the e-Builder Cost module online help, you should familiarize yourself with some key concepts used throughout this section.

Project

Most everything in e-Builder takes place within the context of a project. In order for you to begin your budget process you first have to create a project. Each real world project is associated with a project in e-Builder. If you are working on the real world project, your project administrator or manager can add you as a member of a project in e-Builder.

Account Codes

Account codes are the codes used to categorize the costs on all projects. A collection of codes are used to create the budget for the project and specific costs are assigned to the account codes in the budget. By using these consistent account codes across all projects you can consistently associate all of the costs on one or more projects with specific categories and easily report on these costs.

Company

Every commitment and actual cost that is entered is associated with a company. The company must be created in the Contacts module of your account. The companies listed in the contacts module can also be used as a reference for all users that have access to view contacts.

Funding Sources

Funding sources are the accounts or institutions from which project funds are received. Examples include debt, equity, grants, and donations. By using funding sources you are able to track the amount of funds remaining in each funding account at any point in the project.

Budget

A budget is the original detailed cost estimate for your project.

Commitment

A commitment is a promise that you make to a seller to purchase goods or services in exchange for money in accordance with specific terms and conditions. The most common types of commitments are contracts and purchase orders.

Actual Cost

Actual Costs are project expenses and invoices that have been approved for payment. Examples include invoices, reimbursable expenses, and contractor applications for payment.

Cash Flow

Cash Flow is used to project the amount of money that will be expended each month in the remaining life of a project. These forecasts can be reported at the program level in the Reports module to plan program wide cash flow needs in future months, quarters, or years.

Over/Under

In the Cost Summary for a project the (Over/Under) shows the expected variance to budget for the project. For example, an over/under of zero means that a project is expected to be exactly on budget. The over-/under is automatically calculated based on the data entered for the project.

Status

In the Budget, Commitment, and Actual Cost areas of the Cost module each item that is entered has a status which indicates whether or not it has been finalized. Every item is first placed in draft status so that it can be reviewed before proceeding. Depending on what type of item is being entered, its status can move through intermediate steps before it becomes approved.

Projected

Projected is a status indicator that is available for commitment and budget changes. It is used to indicate when there is a possible change to an existing commitment or line item in the budget. By entering these items the team can gain visibility into any anticipated changes before they occur.

Pending

Pending is a status indicator that is available for commitments, commitment changes, and budget changes. It is used to indicate when there is a likely change to an existing commitment or line item in the budget. It is also used to record commitments that are likely to occur, but are not yet finalized- such as a verbal acceptance of a contract but the signed copy has not been received. By entering these items the team can gain visibility into any anticipated changes before they occur.

Commitment Invoice

A commitment Invoice is an actual cost associated with an existing commitment. For example, a request for payment from a vendor that you have a contract with would be entered as a commitment invoice.

General Invoice

A general invoice is an actual cost that does not have an associated commitment. For example, a fee paid to the city for a permit is typically entered as a general invoice.

Commitment and Budget Control Validations

When commitments, budgets, and invoices are added or changed, e-Builder performs cost validations. The additions and modifications are checked against the Contract and/or the Budget to make sure amounts do not exceed contract or budget amounts. Below is a summary of how e-Builder performs these validations. Should you attempt to perform a transaction that violates a cost validation, an error message displays indicating so, and the transaction will fail.

Cost Entity	Setting	Validation	Expression
Commitment Invoices	General Settings	The total value of actuals received to date plus the commitment invoice amounts may be equal or less than the current contract value, but they cannot exceed the current contract value.	Actuals Received + Invoice Amount MUST < = Current Contract Value
	<i>If</i> , the current contract value is negative	Actuals received to date plus the commitment invoice amount must be greater than or equal to the current contract value.	Actuals Received + Invoice Amount MUST > = Current Contract Value
	<i>If</i> , commitment control setting is Uncontrolled, the commitment is checked against the current budget	The total value of actuals received to date plus the current invoice amount must be less than or equal to the current budget.	Actuals Received + Invoice Amount MUST < = Current Budget
	<i>If</i> , the budget is negative	Actuals received to date plus this Invoice Amount must be greater than or equal to the Current Budget.	Actuals Received + Invoice Amount MUST > = Current Budget
Commitments	General Setting (When a commitment is added, e-Builder checks the amount against the budget)	The sum of the current commitments plus the commitment must be less than or equal to the current budget.	Current Commitments + Commitment Amount MUST < = Current Budget
	<i>If</i> , the current budget is negative	The sum of current commitments and the commitment must be greater than or equal to the current budget.	Current Commitments + Commitment Amount MUST > = Current Budget
Commitment	General Setting	The total value of the current contract	Current Con-

Cost Entity	Setting	Validation	Expression
Changes	(When a commitment change is added, e-Builder checks the amount against the budget)	value plus the commitment change amount must be greater than or equal to actuals received to date.	Contract Value + Invoice Amount MUST > = Actuals Received
		The total current commitments plus the commitment change must be less than or equal to the current budget	Current Commitments + Commitment Change MUST < = Current Budget
	<i>If</i> , actuals received is negative	The current contract value plus the commitment change must be less than or equal to actuals received.	Current Contract Value + Invoice Amount MUST < = Actuals Received
	<i>If</i> , current budget is negative	The sum of current commitments plus the commitment change must be greater than or equal to the current budget.	Current Commitments + Commitment Change MUST > = Current Budget
General Invoices	General Setting: (When a general invoice is applied, e-Builder checks the invoice against the budget)	The sum of the actuals received to date plus the Invoice amount must be less than or equal to the current budget. And The sum of current commitments to date plus the invoice must be less than or equal to the current budget.	Actuals Received + Invoice amount MUST < = Current Budget And Current Commitments + Invoice Amount MUST < = Current Budget
		<i>If</i> , the current budget is negative	The combined amounts of the actuals received plus this invoice amount And

Cost Entity	Setting	Validation	Expression
		the current commitments plus the invoice amount must be greater than or equal to the current budget.	MUST > = Current Budget And Current Commitments + Invoice Amount MUST > = Current Budget
Budget Change	General Setting	The combined current budget plus the budget change amount must be greater than or equal to both the current commitments and actuals received:	Current Budget + Budget Change MUST > = Current Commitments And Current Budget + Budget Change MUST > = Actuals Received
	<i>If, the sum of the current budget and the budget change is negative</i>	The combined amount of the current budget and the budget change must be less than or equal to the current commitments and the actuals received	Current Budget + Budget Change MUST > = Current Commitments And Current Budget + Budget Change MUST > = Actuals Received

Cost Summary Page

The Cost page allows you to see cost data across all the projects you have access to. From here you can sort projects based on custom views and select a specific project for which to view cost data. In addition, if Account Level Cost is enabled on your account, the following tabs are available: Account Funding Sources, Master Commitments, Master Commitment Changes and Master Invoices.


To access the Cost page

- From the top navigation tabs, click **Cost**.

A description of the fields and buttons on this page are described below:

Cost Summary

The data that appears on this table is based on the view that is selected in the drop-down list. Click any of the column headers to sort data by that information type.

Export to Excel icon (): Exports this page to an Excel spreadsheet.

Account Funding Sources


This tab will be visible if account level funding is enabled on the account. Use this tab to manage account funding sources. This feature is a subcomponent of Account-Level Cost.

- **Account Cost Summary:** This section gives you a snapshot of monetary activities throughout the account.
- **Total Funds:** Displays the total amount of funds available at the account level.
- **Current Master Commitments:** Displays the total amount of approved master commitments on the account.
- **Approved Master Invoices:** Displays the total amount of approved master invoices on the account.
- **Actual Cost To Complete:** Displays the total invoice amount needed to fulfill all approved master commitments. The formula is as follows: (commitments) (actuals approved).
- **Available Funds:** Displays the total amount of funds available in your account funding sources.

Note: Funds are not depleted from the funding source until invoices have been approved. This total does not take into account invoices marked received.
- **Projected Over/(Under):** Displays the difference between projected commitments and the projected budget. The formula is as follows: (projected commitments) (projected budget).

Funding Sources Tab

This tab lists all available account funding sources and details related to each.

- **Add:** Click to add account funding sources.
- **Export to Excel® Icon** (): Click to export the funding source details to a Microsoft Excel® spreadsheet.

Funding Rules Tab

Use this tab to view, add or modify funding rules. For more information, see About Funding Rules.

- **Add:** Click to add account funding rules.
- **Source:** Each funding rule is listed in bold and beneath each section, are the funding sources that make up the rule. The percentage that will be taken from each funding source is listed in the Percentage column.
- **Percentage:** Displays the percentage that will be taken from the corresponding funding source.

Funding Processes

Via cost settings, account administrators can allow funding sources to be added via a process. If this is the case or if the user has a choice between standard Cost entries and a process, this tab will appear and list

Add: Click to add account funding sources.

Master Commitments

The data that appears on this table is based on the view that is selected in the drop-down list. Click any of the column headers to sort data by that information type. On this tab, you can add or edit a master commitment.

Master Commitment Changes

The data that appears on this table is based on the view that is selected in the drop-down list. Click any of the column headers to sort data by that information type. On this tab, you can add or edit a master commitment change.

Master Invoices

The data that appears on this table is based on the view that is selected in the drop-down list. Click any of the column headers to sort data by that information type. On this tab, you can add or edit master invoices.

Project Cost Summary Page

Cost summary information is displayed for approved budgets only. This summary gives visibility of budget status and allows you to anticipate expenditures that may need to be considered. The columns displayed on the Cost Summary page are contingent on what is included in the cost summary layout. Cost summary layouts are created by the e-Builder administrator and used to view different sets of information.

Note: If cost is not yet in use for this project, you need to first set a budget.

Tip: The different statuses of a cost entity (budget changes, commitments, commitment changes, and invoices) can also be used in the Processes module to track different phases of an approval process.

To access the Project Cost Summary page:

1. Click the **Cost** tab located in the Top Navigation Tabs.
2. Choose a project from the **All Projects** menu.
The Project Cost Summary page is displayed.

If you are already within a project, you can access the Cost Summary page by clicking the Cost Summary link located in the left navigation bar.

The Financial Summary shows detailed cost information for each line item in the budget. Click a line item link to open the Line Item Details page and view the dollar breakdowns that are totaled in the cost summary. You can also click the dollar amounts to view detailed information.

- **Layout:** Click this drop-down arrow to view the different layouts available for this financial summary. Cost summary layouts are created by the account administrator. For more information on cost summary layouts, see Cost Summary Layouts.
- **Group By:** Click this drop-down arrow to select a different view from which to see and group budget lines items by. Options in this drop down menu are based on your account code structure, in other words, it is based on how you are rolling up your costs.
- **Microsoft Excel® Icon:** Click to export the Financial Summary to a Microsoft Excel® spreadsheet as it is currently displayed.

Columns Description

Note: All of these columns may not appear on your financial summary table. The columns that display depends on the selected cost summary layout.

- **Original Budget:** This is the originally approved budget amount. This figure can include budget changes to the original budget amount.
- **Approved Budget Changes:** This is the amount of approved budget changes.
- **Current Budget:** This is the approved original budget and all approved budget changes.
- **Projected Budget Changes:** This is the amount of projected budget changes. The projected status is used to account for anticipated changes to the budget. "Projected" is a status that may or may not be used. In a process, this status might automatically be set once the process enters a specific step.
- **Pending Budget Changes:** The pending usually refers to budget changes that are pending a hard signature. "Pending" is a status that may or may not be used. In a process, this status might automatically be applied once the process enters a specific step.
- **Projected Budget:** This total includes the original budget amount plus all pending, projected, and approved budget changes.
- **Original Commitments:** This is the amount of all approved commitments. This figure can include commitment changes against the original commitment value.
- **Projected Commitments:** This total is the sum of current commitments, pending commitments, pending commitment changes and projected commitment changes.
- **Pending Commitments:** The pending status usually refers to commitments that are pending a hard signature. "Pending" is a status that may or may not be used. In a process, this status might automatically be applied once the process enters a specific step.

- **Approved Commitment Changes:** This is the amount of all approved changes to the original commitment.
- **Non Commitment Costs:** This is the amount of all approved general invoices.
- **Current Commitments:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows:
(approved commitment changes) + (original commitments) + (approved general invoices).
- **Projected Commitment Changes:** The projected status is used to account for anticipated commitment changes. Projected is a status that may or may not be used. In a process, the status might automatically be applied once the process enters a specific step.
- **Pending Commitment Changes:** "Pending" is a status that may or may not be used. In a process, the status might automatically be set once the process enters a specific step. The pending status is usually used to refer to commitment changes that are pending a hard signature.
- **Forecasted Commitments:** This is the commitment line item amount that is included in the forecast. For more information on the forecasting feature, see Forecasting.
- **Unallocated Reserve:** This is the amount of funds that remain in the budget that has not been allocated. The formula is as follows:
Unallocated Reserve = the Maximum of 0.00 OR (Current Budget + Σ (Detail Items that are not Budgeted) - Projected Commitments - Σ (Detail Items that are not Committed)).
Note: The unallocated reserve will not reflect negative values. This is intended to show what is left to be allocated, not a variance.
- **Estimate at Completion:** This is the amount that is needed to complete the project based on the current budget. The formula is as follows:
(projected commitments) + (forecasted commitments) + (unallocated reserve).
- **Actuals Received:** This is the amount of all approved invoices as well as those marked as received. "Received" is a status that may or may not be used, but once invoices have been approved, they will automatically display in this column whether they were marked received or not. In a process, this status might automatically be applied once the process enters a specific step.
- **Actuals Approved:** This is the amount of all approved invoices. In a process, this status is automatically be applied once the process enters a specific step.
- **Net Actuals Paid:** This is the amount of all invoices that have been paid, not including retainage. The formula is as follows:
paid invoices - retainage held (retainage not yet paid).
- **Actuals Paid:** Paid is a status that may or may not be used. In a process, this status might automatically be applied once the process enters a specific step.

- **Net Actuals Approved:** This is the total amount of approved invoices less retainage held (retainage not yet paid).
- **Amount Retained:** This is the total amount being retained.
- **Retainage Released:** This is the amount that is approved to be released.
- **Amount Retainage Paid:** This is the total amount retained against invoices that are in "Paid" status.
- **Retainage Release Paid:** This is the total amount of retainage released from invoices that are in "Paid" status.
- **Current Retainage Held:** This is the amount of retainage currently held (not yet paid).
- **Actual Cost to Complete:** This is the total invoice amount needed to fulfill all commitments. The formula is as follows: (projected commitments) - (actuals approved).
- **Percent Cost Complete:** This is the percentage amount of the costs necessary to complete the project based on the current budget. This total is derived by dividing approved invoices by projected commitments. The formula is as follows: $\% = (\text{approved invoices}) / (\text{projected commitments})$.
- **Current Over/(Under):** This figure represents the amount above or under the current budget. This total is the difference between current commitments and the current budget. The formula is as follows: (current commitments) - (current budget)
- **Projected Over/(Under):** The projected over/ under is the difference between projected commitments and the projected budget. The formula is as follows: (projected commitments) - (projected budget)
- **Forecasted Over/(Under):** This figure represents the forecasted spending that is over/(under) the current budget. This total is the difference between the estimate at completion and the current budget. The formula is as follows: (estimate at completion) - (current budget).

For more information on the forecasting utility, see Forecasting.

About Account Cost and Funding

Note: Account Level Costs and Funding has to be enabled on your account in order to utilize this feature. For more information, please contact e-Builder Support.

Account-level cost and funding affords the ability to track and report on funding and cost activities across the entire account, which includes the versatility to also track at the project level. This feature may be necessary for Task Order Contracts (TOC) where design services have been contracted for one or many projects; Job Order Contracting (JOC) for multi-year contracts; or Indefinite Delivery Indefinite Quality Contracts (IDIQ) where a contract has been negotiated for base years and options years as well. Account level costs and funding also incorporates standard features that are available with standard Cost functionality such as import capabilities, mail merges and cost controls. When enabled, costs transactions are impacted with the tracking of master funding, master commitments, master commitment changes and master invoices.

The following tasks will help you work with master cost and funding:

- Add Account Funding Rules
- Add Account Funding Sources
- Add Master Commitments
- Add Master Commitment Changes
- Add Master Invoices

Cost "Quick Links" Overview

The Cost "Quick Links" are available directly under the top navigation tabs when the Cost tab is selected. This is a static menu that appears throughout all the pages of the Cost module to provide you with easy access to specific tasks.



Getting familiar with this section of the module will help you save a lot of time and energy by reducing the amount of mouse-clicks needed for data entry and searching for pertinent information. These quick links direct you to the exact pages where you need to be to perform various tasks:

- **Cost Summary:** Accesses the main Cost page. If there are views defined, the last view accessed displays. For more information about views, see About Views. This page displays a list of all available projects. Click the name of a project to open the related Project Cost Summary Page.
- **Items Pending Approval:** Click this link to open the **Items Pending Approval** page and see list of cost items that need to be approved. Click the Approve or Reject link to take either action on the item.
- **Unfinished Drafts:** Click this link to open the Unfinished Drafts page and view a list of all cost items that are in a draft status. This view may be of importance if for instance you are responsible for ensuring that all draft cost items eventually leave its draft status. This view displays draft status items across all your projects. You may also reconcile this list every month with your team, or simply need to review outstanding items.

To access the details of a draft item click the Item # (if appropriate) or the Item Description link. You can filter the items that are displayed by clicking on one of the two drop down lists next to the word Show and clicking the Go button. click Show All to return to clear the filter.

- **Data Entry:** Click this link to open the Data Entry Menu page from which you can directly add a budget change, commitment, commitment change or invoice by clicking on the appropriate link.

Items Pending Approval Page

The Items Pending Approval page is a convenient go-to for managers or users with cost-related approval permissions to quickly see the items that require their attention and address approval requests from a central location.

Note: For your convenience, there is also an Items Pending Approval section located on the Home tab.

The Approvals Requested By Me tab is also useful for non-mangers who need to see their outstanding approval requests from a central location.

To access the Items Pending Approval page

1. Click the **Cost** tab located in the top navigation tabs.
 2. Click **Items Pending Approval**, which is located directly under the top navigation tabs.
-

The fields and buttons located on this page are:

- **Filter:** Narrows the search results on the selected tab below. Click the **All Item Types** drop-down arrow to select from a list of cost items to filter by. Click the All Projects drop-down arrow to further narrow your search by project. Click **Go** to render results on the selected tab. Click to show all items pending your approval across projects for the selected tab.
- **Cancel:** Returns to the main Cost page.
- **Export to Excel:**Exports the information to an Excel spreadsheet.
- **Awaiting My Approval Tab:**Displays all cost item approval requests that need your attention. Approving an item will move it from draft status to approved status. Rejecting will keep the item in draft status. To view the details of an item click its item # (if applicable) or Item Description.
- **Approvals Requested By Me Tab:** Displays all the approvals requested by you. This view is a great option to help you see the outstanding approval items that remain or may be a bottle neck for you to proceed.

Unfinished Drafts Page

This page can be used as an effective management tool, helping you stay abreast of incomplete items that may need your attention to move the project along.

To access the Unfinished Drafts page

1. Click the **Cost** tab located in the top navigation tabs.
 2. Click **Unfinished Drafts**, which is located directly under the top navigation tabs.
-

The fields and buttons located on this page are:

- **Filter:** Narrows the search results on the selected tab below. Click the **All Item Types** drop-down arrow to select from a list of cost items to filter by. Click the All Projects drop-down arrow to further narrow your search by project. Click **Go** to render results on the selected tab. Click to show all items pending your approval across projects for the selected tab.
- **Cancel:** Returns to the main Cost page.
- **Export to Excel:**Exports the information to an Excel spreadsheet.

Data Entry Page

The Data Entry Menu page gives you quick access to some of the most common functions in the Cost module.

To access the Data Entry page

1. Click the **Cost** tab located in the top navigation tabs.
2. Click **Data Entry**, which is located directly under the top navigation tabs.

The following functions are available on this page:

Select an Item to Add: This section is displayed by default for all users with access to the Cost module.

- **Budget Change:** Opens the Add Change Details page to add a budget change.
- **Commitment:** Opens the Add Commitment page and add a commitment.
- **Commitment Change:** Opens the Add Commitment Change Details page to add a commitment change.
- **Invoice:** Opens the Add Invoice page to add an invoice.

Select Batch Process: The Cost import capability must be enabled by an e-Builder Support Team member. For more information please contact your account manager.

- **Import Budget Line Items:** Opens the Import Budget Line Items page to begin the import process.
- **Import Budget Changes:** Opens the Import Budget Changes page to begin the import process.
- **Import Commitments:** Opens the Import Commitments page to begin the import process.
- **Import Commitment Changes:** Opens the Import Commitment Changes page to begin the import process.
- **Import Invoices:** Opens the Import Invoices page to begin the import process.
- **Update Invoice Payment Status:** Open the Update Invoice Payment Status page to begin the import process.

Funding Sources

A funding source is an entity that provides all or partial funds (or capital) used to pay for the cost of a project. These funds can be allocated for either short term or long term purposes. Funding sources allow you to establish where funds are being endowed for budget line items, commitments and/or invoices. Once funding is enabled for a particular component, e-Builder prompts users to make a selection before adding a budget line item, processing a commitment or invoice to ensure consistent usage throughout the life of the project.

Funding rules is an associated concept used in the Cost module with regard to funding management. They are a combination of funding sources, with a set percentage of dollars spread out among them and these funding rules are selected when adding budget line items or processing commitments and invoices.

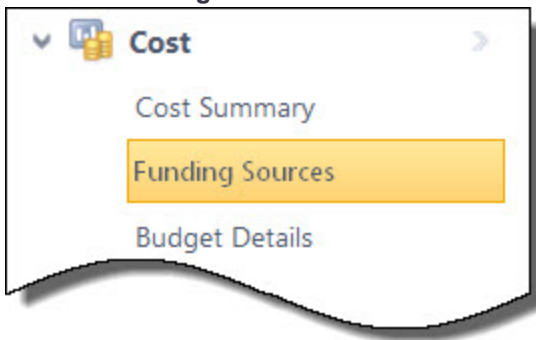
The following topics relate to using funding sources in e-Builder:

- About Funding Rules
- Add/Edit Funding Rules
- Manage Funding Sources
 - Attach Notes to Funding Source
 - Attach Documents to Funding Source
 - Attach Forms to Funding Source
 - Attach Processes to Funding Source
- Track Funding
- Funding Categories
- Funding Sources Page Overview

Access the Funding Sources Page

To access the funding sources page

1. Go to the Project Cost Summary page.
For more information, see [Access the Project Cost Summary Page](#).
2. Click the **Funding Sources** link located in the Left Navigation Bar.



Track Funding

Depending on your account settings, you can track funding on the budget level and/or the commitment level. If funding is enabled for budgets and/or commitments and at least one funding source is added, then users will be required to select a funding rule before any action can be taken on a budget line item, budget changes, commitment items or commitment changes. This way you can see how much funding from each funding source has been allocated to each budget line item and/or commitment. A Budget tab and/or a Commitment tab are located on the Funding Source Details page that allows you to see exactly how much money has been allocated from each funding source.

Cost > Project Cost Summary > Funding Sources > Funding Source Details

Funding Source Details

Funding Details Edit

Funding Source Name: Capital Account 1	Balance: 1,151,126.92
Created By: Craemer, Richard	Last Modified By: Craemer, Richard
Created Date: 12.09.2008	Last Modified Date: 11.20.2009
Description:	Funding Category:

Transaction Register (44) | **Budget (7)** | Commitments (42) | Custom Fields (3) | Notes (0) | Documents (0) | Forms (0) | Processes (0)

Approved Commitments Show: Approved All Commitments Go Show All

#Δ	Description	Company	Date	Status	Commitment Type	Total Commitment Amount	Amount This Funding Source
001-ABC123	More hurricane shutters	All Broward Hurricane	05.17.2010	Approved	Contract	10,100.00	10,100.00
002-ABC1211	Land and Building	Aldor Sales, Inc.	05.21.2010	Approved	Contract	200.00	200.00
003	Appraisal Fee	Alan W. Smith, Inc.	11.06.2008	Approved	Contract	145,000.00	145,000.00
003-9845	Alan Smith PO	Alan W. Smith, Inc.	06.02.2010	Approved	Purchase Order	500,100.00	500,000.00
004	Reimbursables	Alan W. Smith, Inc.	11.06.2008	Approved	Other Commitment	48,500.00	48,500.00
005	Consulting	S.M. Wilson & Co.	11.06.2008	Approved	Contract	117,100.00	107,100.00
005123	Webster Contract	Ace-Air Incorporated	05.07.2009	Approved	Contract	1,000.00	1,000.00
007	Special Consulting	CIH-Schricker Company, Inc.	11.06.2008	Approved	Contract	128,000.00	128,000.00
012345			11.20.2009	Approved	Purchase Order	10,000.00	10,000.00
					Contract	23,000.00	

Likewise, the Funding Rule column on the Budget Details and Commitment Details pages allows you to quickly see all of the funding sources that contribute to the budget or commitment item.

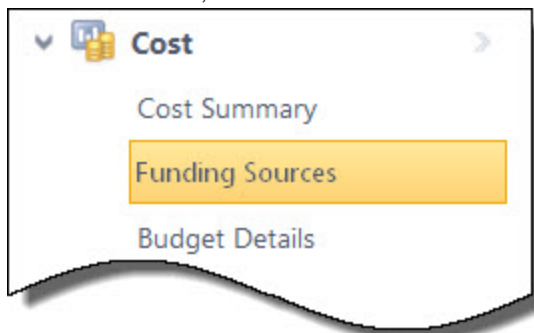
Commitment Items (2) | Commitment Changes (1) | Actual Costs (3) | Custom Fields (1) | Notes (0) | Documents (0)

Commitment Items

Item #Δ	Description	Budget Line Item	Current Budget	Funding Rule	Commitment
001	Land Acquisition - procurement	01	20,000.00	Atlanta Legislature	
002	Design Costs	DC	0.00	Atlanta Legislature	
Totals					

To access the Funding Source Details Page Budget Tab/Commitment Tab and start tracking your funding

1. Go to the Project Cost Summary page.
For more information, see Access the Project Cost Summary Page.
2. In the Cost menu, located on the left side of the page, click the **Funding Source** link.



3. Click the title of the desired funding source. The Funding Source Details page displays. Click the Budget or Commitment Tab.

Related Topics:

- Funding Settings Overview
- Funding Source Details Page Overview

Add/Edit Funding Sources

To add/edit funding sources:

- Add Funding Sources
- Edit Funding Sources

Add Funding Sources

1. Go to the Funding Sources page.
For more information, see Access the Funding Sources Page.
2. Click **Add**.
The Add Funding Source page is displayed.
3. In the **Name** field, enter the name of the funding source.
4. If a funding category is assigned to the account, click the **Funding Category** drop-down arrow and select a funding category.
5. Click **Save**.

Edit Funding Sources

Funding sources can be edited by modifying the name, description or funding category.

1. Go to the Funding Sources page.
For more information, see Access the Funding Sources Page.
2. Click the **Edit** link located to the left of the funding source you want to edit.
3. Make any of the following changes:
 - Change the name of the funding source
 - Modify the Description of the funding source
 - Click the Funding Category drop-down list and select a funding category
4. Click **Save**.

Add Account Funding Sources

Note: This features must be enabled on your account in order to utilize. For more information, contact e-Builder Support.

To add account funding sources

1. Click **Cost** from the Top Navigation menu.
2. Click the **Account Funding Sources** tab.

The Funding Sources tab is automatically selected.

3. Click **Add**.

The Add Account Funding Source page is displayed.

4. Enter all required fields.

For a description of each field, see [Add Account Funding Sources Page Overview](#).

5. Click **Save**.

Apply Templates to Funding Sources

To apply a funding source template

1. Go to the Funding Sources page.

For more information, see [Access the Funding Sources Page](#).

2. Click **Apply Template**.

The Apply Funding Template page is displayed.

3. Click the title of the funding template you want to apply to your project.

A list of all funding sources that are in your template display.

4. Click **Continue**.

The Funding Sources page is displayed.

5. Click **Apply Template**.

Add Money to Funding Sources

To add money to funding sources

1. Go to the Funding Sources page.

For more information, see [Access the Funding Sources Page](#).

2. Click the name of the funding source you want to add money to.

3. Click **Add Funds**.

4. In the **Description** field, enter a description for the funding adjustment.

5. In the **Amount** field, enter the deposit amount.

6. Click **Save**.

Edit Funding Adjustments

The addition or modification of funds in e-Builder is referred to as a funding adjustment; this includes the initial deposit of dollars into a funding source. After funding adjustments are made, changes are reflected in the transaction register.

To edit or delete funding adjustments

1. Go to the Funding Sources page.

For more information, see [Access the Funding Sources Page](#).

2. Click the name of the funding source.

3. Click the title of the transaction description.
The Edit Funding Adjustment page is displayed.
4. To edit the funding amount, enter the new amount in the **Amount** field, and then click **Save**.
—Or—
To delete the adjustment, click **Delete Adjustment**. You are prompted for confirmation. Click **Yes, Delete the Funding Adjustment**.

Delete Funding Sources

Note: Funding sources that are currently in used cannot be deleted.

To delete funding sources

1. Go to the Funding Sources page.
For more information, see [Access the Funding Sources Page](#).
2. Click the **Delete** link located to the left of the funding source you want to remove.
You are prompted for confirmation.
3. Click **Yes, Delete the Funding Source**.

Attach Processes to Funding Source

From the Processes tab, you can view, as well as attach any supporting processes associated with the funding source. Any open/closed processes that have been created in the project can be attached to the funding source. e-Builder displays the process name, subject, step name, date opened (since), who it was attached by, and the date it was attached. To view attached processes, simply click the process name.

Processes are permission driven. If you do not have the permission level to view the process in the Processes module, you will not be able to view the process attached.

To attach processes to funding sources

1. Go to the Funding Sources page.
For more information, see [Access the Funding Sources Page](#).
2. Click the name of the funding source.
The Funding Source Details page displays.
3. Click the **Processes** tab.
4. Click **Attached Processes**.
The Attach Processes from [Project Name] filter displays.
5. Filter for the processes you want to see.
Results display in the table below.
6. Select the check box next to the process(es) you want to attach.
7. Click **Attach**.

Attach Forms to Funding Sources

From the Forms tab, you are able to view, as well as attach any supporting forms associated with a funding source. The forms that can be attached are any open/closed forms that have been created in the project. e-Builder displays the form name, subject, author, due date, who it was attached by, and the date it was attached. Once attached, you can simply click the form name to view it.

Note:

- Forms are permission driven. If you do not have the permission level to view the form in the Forms module, you will not be able to view forms attached to funding sources.
- Forms can also be removed from funding sources. If you choose to remove forms, they will not be deleted from the e-Builder Forms module.

To attach forms to a funding source

1. Go to the Funding Sources page.
For more information, see [Access the Funding Sources Page](#).
2. Click the name of the funding source.
The Funding Source Details page is displayed.
3. Click the **Forms** tab.
4. Click **Attached Forms**.
The Attach Forms from [Project Name] filter is displayed.
5. Filter for the forms you want to see.
Results display in the table below.
6. Select the check box next to the form(s) you want to attach.
7. Click **Attach**.

Attach Documents to Funding Sources

You have the ability to attach any supporting files associated with a funding source. Once attached, other users can access these files. When attaching files stored within e-Builder, only files specific to the current project can be selected.

Note: Documents can also be removed from funding sources. If you choose to remove documents, they will not be deleted from the e-Builder Documents module.

Tip

In IE10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise™.

To attach documents to funding sources

1. Go to the Funding Sources page.
For more information, see [Access the Funding Sources Page](#).

2. Click the name of the funding source.
The Funding Source Details page is displayed.
3. Click the **Documents** tab. Click **Attach Documents**.
4. In the **Select Attachment Method** section, select your method of attachment.
5. Click **Browse For Files...**
6. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
7. If you are attaching files from e-Builder, go to the next step.
—Or—
If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.
8. Search for and select the e-Builder destination folder.
9. Click **Attach Selected**.

Add Notes to Funding Sources

Notes may be added to a funding source to provide project participants with pertinent information about the source. For example, the Project Manager may want to add a note to let his/her internal team members know that a grant may only be used to purchase certain items. For each note entered, the first and last name and company name of the user is displayed along with the date.

To add notes to funding sources

1. Go to the Funding Sources page.
For more information, see [Access the Funding Sources Page](#).
2. Click the name of the funding source.
The Funding Source Details page displays.
3. Click the **Notes** tab, and then click **Add Note**.
The Add Note page displays.
4. Enter the note in the **Note** box.
5. Click **Save**.

About Funding Rules

Funding rules allow you to apply a predetermined amount of funds from funding sources and categories based on a fixed ratio when adding budget line items, commitments or invoices. This toolset is most resourceful if business rules exist that require a certain amount of funds to be utilized from specific sources. Using funding rules takes the thought out of manually calculating ratios between funding sources, which can be increasingly difficult to do if multiple funding sources or categories exist on the project.

This mechanism is built with the flexibility to manually adjust ratios if necessary while processing budget line items, commitments and invoices. To support the ever changing nature of program management and particularly funds management, users are able to add commitments and invoices without initially assigning fund-

ing rules, but are not able to take action on these items (request approval, mark as paid etc.) until a funding rule is applied. As a best practice, organizations should have 100% funding rules for each funding source to use when applicable.

Related Topic:

Add/Edit Funding Rules

Add Account Funding Rules

Add/Edit Funding Rules

To add/edit funding rules:

- Add Funding Rules
- Edit Funding Rules

Add Funding Rules

To add funding rules

1. Go to the Funding Sources page.
For more information, see [Access the Funding Sources Page](#).
2. Click the **Funding Rules** tab.
3. Click **Add**.
4. In the **Name** field, enter a name for the funding rule.
5. Select the **Active** check box to make this funding rule available for use.
6. In the **Description** field, enter a description for the funding rule.
7. In the **Percentage** fields, enter the percentage of funds from each funding source that will make up this funding rule.
8. Click **Save**.

Edit Funding Rules

To edit funding rules

1. Go to the Funding Sources page.
For more information, see [Access the Funding Sources Page](#).
2. Click the **Funding Rules** tab.
3. Click the title of the funding rule you want to modify.
4. Make all necessary changes.
For detailed descriptions of the fields and buttons located on this page, see [Add/Edit Funding Rule Page Overview](#).
5. Click **Save**.
6. If you are changing a funding rule that has already been applied, you are prompted for confirmation.
Changes to this rule will affect all transactions in the past and future.

7. Click **Yes, Change the Percentage(s)**.
—Or—
Click **No, Keep the Original Percentage(s)**.

Related Topics:

- [About Funding Rules](#)

Add Account Funding Rules

To add account funding rules

1. Click **Cost** from the Top Navigation menu.
2. Click the **Account Funding Sources** tab.
3. Click the **Funding Rule** tab.
4. Click **Add**.
The Add Account Funding Rule page is displayed.
5. Enter all required fields.
For a description of each field, see [Add Account Funding Rules Page Overview](#).
6. Click **Save**.

Funding Sources Page Overview

The Funding Source page is the first to display when accessing funding sources.

Fields and Buttons

The fields and buttons located on this page are:

Funding Sources For

This section includes the project name and the account funding controls. Your funding controls will vary between accounts. To learn about cost controls based on funding, see [Funding Settings Overview](#).

- **Project Name:** This field displays the project name.
- **Project Number:** If available, the project number displays in this field. Project numbers allow you to have a unique identifier for each of your projects. Account administrators can add project numbers by going to Administration Tools > Projects > Project Settings > Choose a custom field option from the Project Number Custom Field drop-down menu.
- **Do Not Allow Committed Amounts to Exceed Funding Source Amounts:** A check mark displays if commitment totals cannot exceed the amount available in funding sources. This is a setting that can be modified by account administrators. Depending on the account settings, this may or may not be edited at the project level. For more information, on this setting, see [Funding Settings Page Overview](#).
- **Do Not Allow Actual Costs to Exceed Funding Source Amounts:** A check mark displays if invoice totals cannot exceed the amount available in funding sources. This is a setting that can be modified by account administrators. Depending on the account settings, this may or may not be

edited at the project level. For more information, on this setting, see [Funding Settings Page Overview](#).

Quick Cost Summary

The Quick Cost Summary offers a more condensed, yet comprehensive view of the budget, providing current status of the original budget, current commitments and invoices paid to date.


- **Current Budget:** This is the approved original budget and all approved budget changes.
- **Current Commitments:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows: (approved commitment changes) + (original commitments) + (approved general invoices).
- **Actuals Approved:** This is the amount of all approved invoices.
- **Actual Cost to Complete:** This is the total invoice amount needed to fulfill all commitments. The formula is as follows: (projected commitments) (actuals approved).
- **Available Funds:** This is the amount of funds available in your funding sources.

Note: Funds are not depleted from the funding source until invoices have been approved. This total does not take into account invoices marked received.

- **Forecasted Over/ (Under):** This figure represents the amount above or under the forecasted budget. This total is the difference between the estimate at completion and the current budget. The formula is as follows: (estimate at completion) (current budget). For more information on the forecasting utility, see [Forecasting](#).

Funding Sources Tab

This tab displays by default and lists all existing funding sources for the selected project.

- **Apply Template:** Click to apply funding templates. These templates are created by your e-Builder account administrator. For more information, see [Working with Funding Templates](#).
- **Add:** Click to add new funding sources.
- **Export to Excel® Icon** (): Click to export the funding source details to a Microsoft Excel® spreadsheet.
- **Edit:** Click to make changes to the funding source.
- **Name:** Displays the name of the funding source. Click to open the Funding Source Details page to view more information, add funds or take additional action on the funding source.
- **Description:** Displays the description of the funding source.
- **Funding Category:** Displays the funding category the funding source belongs to. For more information, see [Working with Funding Categories](#).
- **Total Funds:** Displays the total amount that has been deposited into the funding source.

Note: The Remaining Funds field displays the total amount remaining to date.

- **Budgeted:** This column appears only if funding is enabled at the budget level. For more information, see [Funding Settings Page Overview](#). Displays the total amount of the budget line items associated to this funding source.


- **Committed:** Displays the amount from the funding source that has been accounted for in a commitment.

Note: Funds are not depleted from the funding source until invoices have been approved. This total does not take into account invoices marked received.

- **Remaining Funds:** Displays the amount currently available in the funding source.

Funding Rules Tab

Use this tab to view, add or modify funding rules. For more information, see About Funding Rules.

- **Add:** Click to add funding rules.
- **Export to Excel® Icon** (): Click to export the funding rule details to a Microsoft Excel® spreadsheet.
- **Source:** Each funding rule is listed in bold and beneath each section, are the funding sources that make up the rule. The percentage that will be taken from each funding source is listed in the Percentage column.
- **Percentage:** Displays the percentage that will be taken from the corresponding funding source.

Add/ Edit Funding Rule Page

This page allows you to add or make changes to funding rules.

Fields and Buttons

The fields and buttons on this page are:

- **Save:** Click to save changes to the funding rule.
- **Cancel:** Click to discard any changes you may have made to the funding rule.
- **Funding Rule Details:**
 - **Name:** Enter the name of the funding rule in this field.
 - **Active:** Select to make the funding rule active and available for use.
 - **Description:** Enter a description of the funding rule.
- **Funding Source Breakdown:**
 - **Funding Source:** Displays the name of the funding sources that make up the funding rule.
 - **Description:** Displays the description of the funding source.
 - **Percentage:** Enter the percentage that should be distributed to the funding rule from each funding source. The total percentage for all funding sources must equal 100.

Related Topics:

- Add/Edit Funding Rules

Funding Source Details Page

The Funding Source Details page is displayed when a funding source is selected. From here you are able to manage funding by adding and editing funds. If the setting is enabled on your account you can also track funding sources at the budget, commitment, and/or invoice levels. You can also attach notes, documents, forms,

and processes.

The fields and buttons on this page are:

Funding Source Details - Buttons

- **Edit:** Click to open the Edit Funding Source page and modify any of the funding source details such as the name, description, funding category or any custom fields that may exist.
- **Delete:** Click to delete this funding source. This button does not display for funding sources that are already in use.

Funding Details - Fields


Funding Details is a static section of the page that appears regardless of the tab that is selected. The section provides detailed information about the funding source.

- **Funding Source Name:** Displays the name of the funding source.
 - **Created By:** Displays the name of the person that added the funding source.
 - **Created Date:** Displays the date that the funding source was created.
 - **Description:** Displays the description of the funding source.
 - **Total Funds:** Displays the total amount that has been deposited into the funding source.
- Note:** The Balance field displays the total amount remaining to date.
- **Balance:** Displays the amount currently available in the funding source.
 - **Last Modified By:** Displays the name of the person who made the most recent changes to the funding source.
 - **Last Modified Date:** Displays the date the funding source was last modified.
 - **Funding Category:** Displays the category that the funding source belongs to.

Transaction Register Tab - Fields

This tab displays by default when the Funding Source Details page is opened. The transaction log lists all transactions made to this funding source and is an early warning detection system to inform you as you approach a \$0 balance.


Note: The transaction register balance can go in the negative as indicated by a balance in parentheses. There is no automatic rule in place to restrict invoices from being entered if no funding is available for a funding source, UNLESS this particular funding cost control has been configured by the account administrator; for more information, see Funding Settings Overview.

- **Add Funds:** Click to open the Add Funding Adjustment page and add money to the funding source.
- **Export to Excel® Icon** (): Click to export the details of the transaction register to a Microsoft Excel® spreadsheet.
- **Date:** Displays the date the transaction was entered.
- **#:** Displays the invoice number of any withdrawals made using this funding source. If the transaction was not a withdrawal, this column remains empty.

- **Transaction Description:** Displays the description of the transaction as entered by the user. Click the transaction description link to access the details of the invoice or funding adjustment (deposit).
- **Deposit:** Displays the deposit amount into the funding source. If the transaction was not a deposit, this column remains empty.
- **Withdrawal:** Displays the withdrawal amount from the funding source. If the transaction was not a withdrawal, this column remains empty. These values are updated as actuals are approved.
- **Balance:** Displays funding source balance at the time the transaction was made. The last line in this table is the current balance to date. Amounts in parentheses indicate a negative balance.

Budget Tab - Fields

The Budget Tab displays only if funding sources are required when entering budget line items. This is an account setting that must be enabled by e-Builder Support in order to track funding at the budget level. If this tab does not display, but there is a need to track funding at the budget line item level, contact your administrator, or contact Support. For more information, see Funding Settings Overview.

- **Group By:** Click to choose an option for which to sort the budget line items by. Choose from:
 - **Line Item:** This view groups data by budget line item.
 - **Cost:** This view groups data by cost code.
- **Export to Excel® Icon** (): Click to export the budget line item details to a Microsoft Excel® spreadsheet.
- **Line Item:** Displays the budget line item number that is expended from this funding source. Click the line item number to open the Line Item Details page to view its details.
- **Description:** Displays the description of the budget line item as entered by the user.
- **Current Budget:** This is the approved original budget and all approved budget changes.
- **Percentage:** Displays the percentage of that original budget that has been used from the funding source.
- **Amount:** Displays the amount of money from each respective budget line item that has been spent from the funding source.

Commitments Tab - Fields

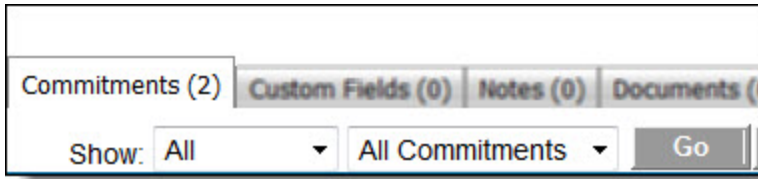
The Commitment Tab displays only if funding sources are required when entering commitment line items. This is an account setting that can be enabled by e-Builder Support in order to track funding at the commitment level. If this tab does not display, but there is a need to track funding at the commitment line item level, contact your administrator to enable this setting. For more information, see Funding Settings Overview.


The summary of all commitment line item allocations for the funding source is summed in the Amount This Funding Source column.

Tip: Click the commitment # or description to be directed to the commitment details. Click the company name to be directed to the company details.

- **Show:** Click the All drop-down arrow to select commitment statuses to choose from that will display in the table below. Click the All Commitments drop-down arrow to select commitment types. After

preferences have been selected, click **Go** to display results in the table below.



- **Go**: Click to render results in the table below, after preferences have been selected from the Show drop-down list.
 - **Show All**: Click to show all commitment status and commitment types in the table below.
 - **Export to Excel® Icon** (): Click to export the details of the transaction register to a Microsoft Excel® spreadsheet.
 - **#**: Displays the commitment number. Click this link to be redirected to the Commitment Details page and access commitment details.
 - **Description**: Displays the description of the commitment as entered by the user. Click this link to be redirected to the Commitment Details page and access commitment details.
 - **Company**: Displays the name of the company associated with the commitment item. Click this link to be redirected to the Company Details page and access company details.
 - **Date**: Displays the date that the commitment was entered.
 - **Status**: Displays the status of the commitment.
 - **Commitment Type**: Displays the commitment type. Commitment types are determined by the e-Builder Administrator. For more information, see Commitment Types.
 - **Total Commitment Amount**: Displays the total amount committed per commitment line item.
 - **Amount This Funding Source**: Displays the total amount allocated to the commitment from this funding source. This column will help you determine whether a 100% funding rule was used or only a percentage of the commitment came from this funding source.
- Tip**: To easily determine the percent allocated from this funding source, click the Item Number or Description to be redirected to the Commitment Details page and then click **View Funding**.
- **Custom Fields**: Displays funding source custom fields if they have been created for this account for editing.
 - **Notes Tab**: Lists all notes added to the funding source. For more information, see Add Notes to Funding Sources.
 - **Documents Tab**: Lists all documents added to the funding source. For more information, see Attach Documents to Funding Sources.
 - **Forms Tab**: Lists all forms attached to the funding source. For more information, see Attach Forms to Funding Sources.
 - **Processes Tab**: Lists all processes attached to the funding source. For more information, see Attach Processes to Funding Sources.

Add Funding Adjustment Page

The Add Funding Adjustment page is displayed in the process of adding funds to funding sources. In e-Builder, any change to funds is considered a funding adjustment, even if it is an initial deposit.

Fields and Buttons

The fields and buttons located on this page are:

Funding Details

- **Funding Source Name:** Displays the name of the funding source.
- **Created By:** Displays the name of the user that created the funding source.
- **Created Date:** Displays the date that the funding source was created on.
- **Description:** Displays the description of the funding source as entered by the user who created it.
- **Balance:** Displays the current funding source balance.
- **Last Modified By:** Displays the name of the user that last modified any details of adjustments related to the funding source.
- **Last Modified Date:** Displays the date of the most recent changes made to the funding source.

Funding Adjustment Details

- **Description:** Enter a description for the adjustment in this field.
- **Amount:** Enter the adjustment amount in this field.
- **Save:** Click to save changes.
- **Cancel:** Click to cancel the transaction. All unsaved changes will be lost.

Add Account Funding Sources Page

This page is used to add account level funding sources.

For instructions, see Add Account Funding Sources.

Fields

The fields on this page are:

- **Name:** Enter the name of the funding source.
- **Description:** Enter a description of the funding source.
- **Funding Category:** Select a funding category. Categories provide a way to group like funding sources for reporting purposes.
- **Status:** Choose the status of the funding source.
- **Funding Control for Master Commitments:** Displays the master commitment control that has been established for account funding sources via Funding settings.
- **Funding Control for Master Invoices:** Displays the master invoice control that has been established for account funding sources via Funding settings.

Add Account Funding Rule Page

This page allows you to add or make changes to account funding rules.

For instructions, see Add Account Funding Rules.

Fields and Buttons

The fields and buttons located on this page are:

- **Save:** Click to save changes to the funding rule.
- **Cancel:** Click to discard any changes you may have made to the funding rule.
- **Account Funding Rule Details:**
 - **Name:** Enter the name of the funding rule in this field.
 - **Active:** Select to make the funding rule active and available for use.
 - **Description:** Enter a description of the funding rule.
- **Funding Source Breakdown:**
 - **Funding Source:** Displays the name of the funding sources that make up the funding rule.
 - **Description:** Displays the description of the funding source.
 - **Percentage:** Enter the percentage that should be distributed to the funding rule from each funding source. The total percentage for all funding sources must equal 100.

Budget Details

The Budget Details page gives users the ability to manage every aspect of the project budget. You can add budget line items, view budget details, commitments and all invoices items to give you a definitive, real time view of the project budget, allowing you to report on the most accurate and up-to-date information. The Quick Cost Summary section provides a summary of budget components at a glance. For more information see Budget Details Page Overview.

To access the Budget Details page

1. Click the **Cost** tab located in the Top Navigation Tabs.
2. Choose a project from the **All Projects** menu.
3. On the side project menu, click **Budget Details**.

Tip

Many of the procedures related to working with the budget can be performed by way of an automated cost process. See About Cost Processes for more information.

The following tasks relate to working with budget details in e-Builder:

Budgets

- Create a Budget
- Edit Budget Details
- Request Budget Approval
- Approve Budgets
- Open a Mail Merge document

Quick Cost Summary

This section of the Budget Details page is displayed only after a budget has been approved. It contains information about the budget and its current relation to Actuals and Commitments. For more information on each column, see Budget Details Page Overviews

Budget Line Items

- Apply Budget Template
- Add Budget Line Items
- Print a Budget Mail Merge Template

Budget Changes

- Add Budget Change
- Request Budget Change Approval
- Make a Budget Change Pending
- Make a Budget Change Projected
- Approve a Budget Change
- Reject a Budget Change
- Void an Approved Budget Change
- Delete a Budget Change

Notes / Documents / Forms / Processes

- Add Note to Budget/Budget Line Item
- Attach Documents to Budget/Budget Line Item
- Attach Forms to Budget/Budget Line Item
- Attach Processes to Budget/Budget Line Item

Working with Budgets

Tip

Many of the procedures related to commitments can be performed by way of an automated cost process. See About Cost Processes for more information.

There are a number of actions you can take when working with budgets. Below is a list of tasks for working with budgets:

- Create a Budget
- Apply Budget Template
- Import Budget Line Items
- Add Budget Line Items
- Edit Budget Details
- Request Budget Approval
- Approve Budget Approval Request

- Add Note to Budget/Line Items
- Attach Documents to Budget/Line Items
- Attach Forms to Budget/Line Items
- Attach Processes to Budget/Line Items
- Print a Budget Mail Merge Template

After you have a handle on the budget and it has been approved, you may want to use the Forecasting feature to help you track and plan for foreseen risks, which will help you stay within budget. e-Builder's Cash Flow cost entity may also be of interest to help you plan out how funds will be dispersed throughout the remainder of the project. See the following for more information:

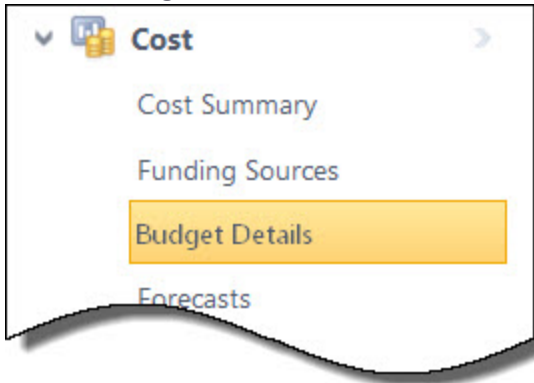
Related Topics:

- Forecasting
- Cash Flow

Access the Budget Details Page

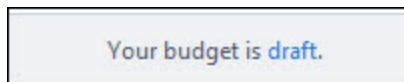
To access the Budget Details page

1. Click the **Cost** tab located in the top navigation tabs.
2. Choose a project from the **All Projects** menu
3. Click the **Budget Details** link located in the left navigation bar.



Create a Budget

Only one budget is permitted per project. When a project does not have an approved budget yet, the following message is displayed: "Your budget is draft". This message will continue to appear until a budget has been approved, even if you've added budget details such as line items and other data. You are still able to make changes to budget data in draft mode without fear that your data will be lost.



Note: Once a budget has been approved, the dollar amounts cannot be changed through the Edit Details page. To change budget amounts post approval, a budget change is required.

To create a budget

1. Go to the Cost module.
For more information, see [Access the Cost Module](#).
2. Click the **draft** link.
The Budget Details page is displayed.
3. From here you can take any of the following actions toward working with the budget:
 - Apply Budget Template
 - Add Budget Line Items
 - Edit Budget Details
 - Request Budget Approval
 - Approve Budget Approval Request
 - Add Notes to Budget/Line Items
 - Attach Documents to Budget/Line Items
 - Attach Forms to Budget/Line Items
 - Attach Processes to Budget/Line Items
 - Print a Budget Mail Merge Template

Apply Budget Template

Budget templates are created by your e-Builder Administrator and are used to quickly apply budget line items when creating your budget. Even if a budget template does not have all or may have more budget line items than you may need, they can save you a great deal of time. Line items from budget templates can always be edited after they have been applied. If you wish to create or modify a budget template, contact your e-Builder Administrator. For more information, see [Working with Budget Templates](#).

To apply a budget template

1. Go to the Budget Details page.
For more information, see [Access the Budget Details Page](#).
2. Click **Apply Template**.
The Apply Template page is displayed.
3. Click the name of the template you want to apply.
4. Click **Continue**.

Import Budget Line Items

Note: Depending on your account settings this page may or may not be available to you. The Cost import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager.

To import budget line items

1. Click **Cost** in the top navigation tabs.
2. Click the **Data Entry** link located in the submenu.
3. Click **Import Budget Line Items**.
The Import Budget Line Items wizard is displayed.
4. Complete all required fields and click **Next** to the last step.
5. If the file was mapped correctly and there aren't any exceptions or warning, click **Import**.

—Or—

If there are exceptions, the Import button is disabled. Click the Exceptions tab to review the exceptions and make any necessary changes to the spreadsheet. Click **Previous** to re-import the file.

Step 1

- **Project Identifier:** This is a unique ID that will identify which project the budget import is for, examples include project name and project number. Project identifiers are entered into e-Builder as required project custom fields. For multiple options to display, the **Do not allow duplicates** check box must be selected on the Edit Custom Fields page.
- **Budget Control:** Click this drop-down arrow to select a budget control option.
 - **Uncontrolled:** Allow commitments and general invoices to exceed the approved budget amount.
 - **Controlled Total:** Prevent commitments, general invoices and budget changes from exceeding the total approved budget amount.
 - **Controlled by Line Item:** Prevent commitments, general invoices and budget changes from exceeding approved budget line item amounts.

For more information on Cost Control settings, see Cost Control.

- **Set budget status to approved:** Select to set the budget status to approve once the import is complete.
- **Leave budget status unchanged:** Select to leave the budget status as it is after the import is complete.

Step 2

Use this section to map the fields in your spreadsheet to the default budget line item built-in fields in e-Builder. For each required and optional built-in field, click the drop-down arrow and select the corresponding field in the spreadsheet. If the column names in your spreadsheet are identical to the built-in fields, they will populate automatically.

Step 3

Review the details of the import whether it was successful or not. Errors are display on the Exceptions and Warnings tabs.

Add Budget Line Items

To add budget line items

1. Go to the Budget Details page.
For more information, see [Access the Budget Details Page](#).
2. Click **Add Line Item**.
The Add Line Item dialog box displays.
3. Enter all required fields.
4. Click **Save & Add New**.
—Or—
Click **Save**.

Edit Budget Details

On the Edit Budget Details page, you can alter basic details of the budget. If the account is configured to allow changes of the budget control, you are able to change that here as well.

To edit budget details


1. Open the Budget Details Page.
2. Click **Edit**.
The Edit Budget Details page is displayed.
3. Make all required changes.
4. Click **Save**.

Below are detailed descriptions of the fields and buttons located on this page.

Budget Details

- **Save:** Click to save modifications after changes have been made.
- **Cancel:** Returns to the Budget Details page. All unsaved changes will be lost.
- **Project Name:** Name of the project.
- **Status:** The status of the project.
- **Draft Created:** The date the initial draft of this budget was created and the name of the person that created it.
- **Budget Control:** Displays the budget control setting for the project budget. This field is editable only if the 'Allow this setting to be changed on individual budgets' check box is selected in the Cost Control Settings.
- **Approved:** The date the budget was approved and the name of the person that approved it.
- **Description:** Description of the budget in this field.

Budget Line Items Tab

- **Attachment Icon (): Add or remove files from the budget line item. The number on this icon displays the amount of the documents that are currently attached.**

- **Line item:** Displays the budget line item number according to the budget cost code structure established by the account administrator. For more information on cost code structures, see [Manage Account Codes](#).
- **Description:** The description of the budget line item as entered by the user.
- **Assumption:** Displays the assumption. Entering an assumption allows you to record the rationale behind how you came to a particular dollar amount. For instance, you may have come to a dollar amount based on the number of MRI machines needed for the hospital. After the budget has been approved, this detail cannot be edited from this page, but from the [Add/Edit Line Item](#) page. See [Add Budget Line Items](#) for more information.
- **Allow Charges:** Select to allow charges to be made against the budget line item.
- **Funding Rule:** If funding is enabled on the budget level, this field displays the funding rule associated with the line item.

Tip

To make the change to all line items at once, click the drop-down arrow from the column header. For individual line items, you can also click this drop-down arrow to select a different funding rule. To customize the rule, click the [Edit](#) link, which allows you to choose the percentage or amount of funds to be withdrawn from each funding source.

If a funding rule isn't currently selected, click the drop-down arrow to make a selection, or click the [Add](#) link to create a custom rule.

- **Approval Required for Change:** Indicate if approval is required to change this line item.
- **Current Budget**
 - For approved budgets:** This is the approved original budget and all approved budget changes.
 - For unapproved budgets:** This is the amount of the original budget.

Custom Fields Tab

Click to view or modify. This tab is displayed only if budget custom fields exist for the account. For more information, see [Cost Custom Fields](#).

Request Budget Approval

If you do not have the permissions to approve a budget, you will need to request approval once budget line items and other details have been entered.

To request budget approval

1. Go to the [Budget Details](#) page.
2. Click **Request Approval**.

Approve Budgets

Approve budget approval request

When a budget approval has been requested, the pending request appears in the Items Pending Approval list for all users with Approve Final Budget permissions. These requests are also displayed on the Home page in the Items Pending Approval section. Below are steps for responding to an approval request from the Cost "Quick Links" Menu.

To respond to a budget approval request

1. Go to the Cost Quick Links menu.
2. Click **Items Pending Approval**.

For a detailed description of this page, see Items Pending Approval Page Overview.

3. Click the **Approve** or **Reject** link for each pending request.

Approve budget

If you have Approve Budget permission, you can approve a budget.

To approve a budget

1. Go to the Budget Details page.
2. Click **Approve**.
3. Enter the approval date.
4. Click **Approve Budget**.

Add Notes to Budget/Budget Line Items

To add notes to the budget details or to budget line items

1. Go to the Budget Details page.
For more information, see Access the Budget Details Page.
2. To add notes to budget line items, click the line item number.
—Or—
To add notes to the budget, go to step 3.
3. Click the **Notes** tab.
4. Click **Add Note**.
5. Enter your note in the **Note** box.
6. Click **Save**.

Attach Documents to Budget / Line Items

From the Documents tab you can view, as well as attach any supporting files associated with the budget. Once attached, other users can view and download these files. One reason you might want to attach documents is to have electronic versions of original files such as budgets that may have previously been on spreadsheets and you need them to be readily accessible for review. Likewise, you are able to attach documents to the budget line item as well; see Edit Budget Details for instructions.

Tip

In IE10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise.

To attach documents to budgets

1. Go to the Budget Details page.
For more information, see [Access the Budget Details Page](#).
2. To attach documents to budget line items, click the line item number.
—Or—
To attach documents to the budget, go to step 3.
3. Click the **Documents** tab. Click **Attach Documents**.
4. In the **Select Attachment Method** section, select your method of attachment.
5. Click **Browse For Files...**
6. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
7. If you are attaching files from e-Builder, go to step 8.
—Or—
If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.
8. Search for and select the e-Builder destination folder.
9. Click **Attach Selected**.

Attach Forms to Budget/Line Items

To attach forms to budgets

1. Go to the Budget Details page.
For more information, see [Access the Budget Details Page](#).
2. To attach forms to budget line items, click the line item number.
—Or—
[To attach forms to the budget, go to step 3.](#)
3. Click the **Forms** tab.
4. Click **Attach Forms**. The Attach Forms from [Project Name] filter displays.
5. Filter for the forms you want to see.
Results display in the table below.
6. Select the check box next to the form(s) you want to attach.
7. Click **Attach**.

Attach Processes to Budget/Line Items

To attach processes to budgets

1. Go to the Budget Details page.
For more information, see [Access the Budget Details Page](#).
2. To attach processes to budget line items, click the line item number.
—Or—
To attach processes to the budget, go to step 3.
3. Click the **Processes** tab.
4. Click **Attach Processes**. The Attach Processes from [Project Name] filter displays.
5. Filter for the processes you want to see. Results display in the table below.
6. Select the check box next to the process(es) you want to attach.
7. Click **Attach**.

Print a Budget Mail Merge Template

A mail merge template is a Microsoft Word® or PDF® print out of the cost data currently in view. Mail merge templates can be generic, providing just the data currently in view, or custom. If a template has not been created for your project, a generic printout opens. Custom templates provide additional cost data. These templates are created by your e-Builder Administrator and can be tailored with field mappings to capture very specific cost information. For more information, see [Budget Templates](#).

To generate a budget mail merge template

1. Open Budget Details Page.
2. Go to any section of the budget data that you want to print.
For instance, the Budget Line Items tab, Budget Changes tab etc.
3. Click **Mail Merge**.

If more than one mail merge template is available the Mail Merge Templates dialog box displays for you to choose your preferred template.



4. Click the **Please select a mail merge template** drop-down arrow and make a selection.

Working with Budget Changes

You can take the following actions when working with budget changes:

- [Related topics](#)

Add Budget Changes

As a project progresses, a need to make changes to the budget may occur a few times throughout the life of the project; in which case a budget change request is in order.

Note: If you need to make changes to a budget line item that has not been created yet, you will first need to add the budget line item, and then proceed with the procedure below.

To add a budget change

1. Go to the Budget Details page.
2. Click the **Budget Changes** tab.
3. Click **Add Change**.
The Add Change Details page is displayed.
4. Enter all required fields.
For a detailed description of all the fields and buttons located on this page, see Add/Edit Change Details Page Overview.
5. Click **Save and Add All Line Items** to apply this change to all existing budget line items. You are prompted for confirmation. Click **Continue**. The Edit Change Details page displays.
—Or—
Click **Save and Add Items One at a Time** to apply this change to a single line item or individual budget line items at a time. The Add Budget Change Item page is displayed.
6. Enter all required fields and make all necessary changes.
7. Click **Save & Add New** or click **Save**.
The Budget Change Details page is displayed.
8. From here you can take any of the following actions regarding the budget change:
 - Request approval
 - Make the change pending
 - Make the change projected
 - Approve the change

Related Topics:

- Add Change Details Page Overview
- Edit Change Details Page Overview
- Budget Change Details Page Overview

Request Budget Change Approval

Based on permissions granted to you by the e-Builder Administrator, some budget changes may require approval before the change is accepted into the budget. A budget change approval request can be made while adding a budget change, but you may have also chosen to record the change and save the approval request for later. It is also possible that different people are involved in this process and it is now your responsibility to make the budget change approval request.

To request a budget change approval

1. Go to the Budget Details page.
For more information, see [Access the Budget Details Page](#).
2. Click the **Budget Changes** tab.
3. Click the change number of the budget change you wish to request approval for.
The Budget Change Details page display.
4. Click **Request Approval**.

Make a Budget Change Pending

A pending status is used to indicate a budget change is likely, such as a verbal acceptance to a contract has been accepted but the signed contract has not been received. To change the status of a budget change from Draft to Pending, follow the procedure below. To change a Pending Budget Change back to the Draft status, click the Return to Draft button.

To make a budget change pending

1. Go to the Budget Details page.
For more information, see [Access the Budget Details Page](#).
2. Click the **Budget Changes** tab.
3. Click the change number of the budget change you wish to make pending.
The Budget Change Details page display.
4. Click **Make Pending**.

Make a Budget Change Projected

A projected status is used when a possible change is expected but is has not been finalized.

To make a budget change projected

1. Go to the Budget Details page.
For more information, see [Access the Budget Details Page](#).
2. Click the **Budget Changes** tab.
3. Click the change number of the budget change you wish to make projected.
The Budget Change Details page is displayed.
4. Click **Make Projected**.

Approve a Budget Change

To be reflected in the current budget, a budget change must first be in the Approved status. Only users with Approve Budget Change permission are able to take this action. When an approval is requested, all users with this permission will see this request in their Items Pending Approval section on the e-Builder Home page.

Tip: In the Administration Tools (Cost > Cost Settings > Settings tab) select the 'Notify users when approval requested' check box to notify users via email when an approval is requested. For more information, see Cost Control.

Budget change approvals are done from the Budget Change Details page. You are redirected to this page when you click the change number in the email notification or from the Items Pending Approval section.

To approve a budget change

1. Open the Budget Details page.
2. Click the **Budget Changes** tab.
3. Click the change number of the budget change you wish to approve.
The Budget Change Details page is displayed.
4. Click **Approve**.
A confirmation message is displayed.
5. Enter an approval date or click the date link to enter today's date.
6. Click **Approve**.

Note: Once a Budget Change has been approved it can no longer be deleted, but it can be voided if necessary.

Reject a Budget Change

A budget change can be rejected after an approval is requested. Once the rejection has been verified, the budget change will return to Draft status where it can either be reworked or deleted. The budget change can also be rejected by the person who initiated the budget change by clicking the **Rescind Approval Req** button located on the Budget Change Details page. Notably, this button will only be present for the originator of the change approval request.

To reject a budget change

1. Go to the Budget Details page.
For more information, see Access the Budget Details Page.
2. Click the **Budget Changes** tab.
3. Click the change number of the budget change you wish to reject.
The Budget Change Details page display.
4. Click **Reject**.
You are prompted to enter a note.
5. Enter a note.
6. Click **Continue**.

Void an Approved Budget Change

Budget Changes that are in the Approved status cannot be deleted, but they can be voided. Voiding a budget change removes it from the current budget information.

Note: Only users with Add/Edit Budget permissions are able to void an approved budget change.

To void an approved Budget Change

1. Go to the Budget Details page.
For more information, see [Access the Budget Details Page](#).
2. Click the **Budget Changes** tab.
3. Click the change number of the budget change you wish to void.
The Budget Change Details page display.
4. Click **Void**.
You are prompted for confirmation.
5. Click **Continue**.

Delete Draft Budget Changes

Only budget changes in draft, pending, or projected status can be deleted. Once a budget change has been approved, it can only be voided; it can no longer be deleted.

To delete a draft budget change

1. Go to the Budget Details page.
For more information, see [Access the Budget Details Page](#).
2. Click the **Budget Changes** tab.
3. Click the change number of the budget change you wish to delete.
The Budget Change Details page display.
4. Click **Delete**.
You are prompted for confirmation.
5. Click **Yes, Delete this Budget Change**.

Related Topic:

- [Void an Approved Budget Change](#)

Import Budget Changes

Note: Depending on your account settings you may or may not be able to import budget changes. The Cost import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager. Once the option is available, only users with Import permissions can perform this task.

To import budget changes

1. Click the **Data Entry** link located in the Top Navigation Tabs.
The Data Entry Menu page is displayed.
2. Click **Import Budget Changes**.
3. **Step 1 of 3:** Complete the following fields:

- **Project Identifier:** This is a unique ID that will identify which project the budget import is for. Examples include project name and project number.
Project identifiers are entered into e-Builder as required project custom fields. For multiple options to display, the **Do not allow duplicates** check box must be selected on the Edit Custom Fields page.
 - **Import File:** Select the import file.
4. Click **Next**.
 5. **Step 2 of 3:** Use this section to map the fields in your spreadsheet to the default budget change built-in fields in e-Builder. For each required and optional built-in field, click the drop-down arrow and select the corresponding field in the spreadsheet. If the column names in your spreadsheet are identical to the built-in fields, they will populate automatically..
 6. Click **Next**.
 7. Step 3 of 3: If the file was mapped correctly and there aren't any exceptions or warning, click **Import**.

—Or—

If there are exceptions, the Import button is disabled. Click the Exceptions tab to review the exceptions and make any necessary changes to the spreadsheet. Optionally click the **Export Exceptions** button to export details to a spreadsheet. Click **Previous** to reimport the file, and then repeat steps 4-7.

Budget Details Page Overview

The Budget Details page is the first to display when accessing the budget component of the Cost module. From this page you're able to gather important details about the budget at a glance by reviewing the Quick Cost Summary. You also have access to further detailed budget information by clicking any of the available links located in the Quick Cost Summary. Below is a detailed description of each field and button located on the Budget Details Page.

Budget Details

- **Mail Merge:** Click to open a mail merge document. In e-Builder, a mail merge document is a Microsoft Word® or PDF® print out of the data currently in view. Mail merge templates can be generic, providing just the data currently in view, or custom. If a template has not been created for your project, a generic printout opens. Custom templates provide additional cost data. These templates are created by your e-Builder Administrator and can be tailored with field mappings to capture very specific cost information. For more information, see Budget Templates.
- **Edit :** Click to edit the Budget Details.
- **Project:** Displays the name of the project. Click the link to open the Project Details page.
- **Created (Draft) Created:** Displays the date the budget was created and the name of the user that created it.
- **Approved (Approval Requested):** Displays the date the budget was approved or when approval was requested for draft budgets.
- **Description:** Description of the budget. Click Edit to modify the description.
- **Status:** Displays the status of the budget.

- **Budget Control:** Displays the cost control setting for the budget. This setting is determined by the e-Builder Administrator and can only be changed to less restrictive. For more information, see Cost Control.


Quick Cost Summary

This section of the Budget Details page is displayed only after a budget has been approved. The Quick Cost Summary details information about the Budget and its current relation to Actuals and Commitments.

- **Current Budget:** Approved original budget amount and all approved budget changes.
- **Current Commitments:** All approved commitment changes plus original commitments, and approved general invoices.
Current Commitments = approved commitment changes + original commitments + approved general invoices.
- **Actuals Approved:** Total amount of all approved invoices.
- **Actual Costs To Complete:** Total invoice amount needed to fulfill all commitments.
Actual Costs To Complete = projected commitments * actuals approved.
- **Available Funds:** Total amount of funds available in your funding sources.
Note: Funds are not depleted from the funding source until invoices have been approved. This total does not take into account invoices marked received.
- **Forecasted Over/(Under):** This figure represents an amount above or under the forecasted budget. This total is the difference between the estimate at completion and the current budget. For more information, see Forecasting.
Forecasted Over/(Under) = estimate at completion - current budget.


Budget Line Items Tab

This tab lists all available budget line items. Click the line item number to open the Line Item Details page and view more detailed information about each budget line item.

- **Group By:** Click to select a view. The Budget Line Items tab can be grouped by Line Item or any other Account Code Segments established.
- **Apply Template:** Click to apply a budget template. Budget templates are complete with budget line items and can be used to save a lot of time when starting the budget. Budget templates are created by the e-Builder Administrator, for more information, see Budget Templates.
- **Add Line Item:** Click to add budget line items. Even if a budget template was used, additional line items can be added by clicking this button. For more information on this procedure, see Add Budget Line Items.
- **Export to Excel® Icon** (): Click to export the budget line item to a Microsoft Excel® spreadsheet.

Budget Changes Tab

This tab lists all recorded budget changes in all available statuses. Click a budget change number to open the Budget Change Details page and access additional information about the budget change.

- **Show:** Click to narrow budget changes that display in the table below by status.
- **Mail Merge:** Click to open a mail merge document after selecting one or more budget change check boxes. In e-Builder, a mail merge document is a Microsoft Word® or PDF® print out of the data currently in view. Mail merge templates can be generic, providing just the data currently in view, or custom. If a template has not been created for your project, a generic printout opens. Custom templates provide additional cost data. These templates are created by your e-Builder Administrator and can be tailored with field mappings to capture very specific cost information. For more information, see Mail Merge Templates.
- **Add Change:** Click to add a budget change. For more information about this procedure, see Add Budget Changes.
- **Export to Excel® Icon** (): Click to export the budget line item to a Microsoft Excel® spreadsheet.

Notes

Add notes to the budget or view any existing notes there may be. Click Add, type your notes and then click Save. You also have the option to check spelling.

Documents

View and attach any supporting files associated with the budget. Once attached, other users can view and download these files.

- **<file name>:** Click to view the file.
- **Properties:** Displays individual file properties
- **Download:** Downloads the file to your computer.
- **Redline:** Marks up the file.
- **Attach Revision:** Attaches documents to this budget. For more information on this procedure, see Attach Documents to Budget / Line Items.
- **Remove:** Removes the file.
- **Edit:** Opens the file in the native application to edit it.

Forms Tab

Forms can be attached to the budget details for additional backup information. From this tab you are able to view, fill out a new form, as well as attach any supporting forms associated with a budget.

Note: Forms are permission driven. If a user does not have the permission level to view the form in the Forms module, they will not be able to view the Form attached to the Budget Details.

- **Fill Out Form:** Opens the Fill Out form on [Project Name] dialog box and select a form to complete. Once it is posted the form will display on this tab.
- **Attach Forms:** Opens the Fill out form on [Project Name] dialog box and attach an existing form to the budget.
- **Remove:** Remove the file.

Processes Tab

- **Attach Processes:** Opens the Attach Processes from [Project Name] dialog box and attach an existing process to the budget.
- **Remove:** Removes the file.

Line Item Details Page

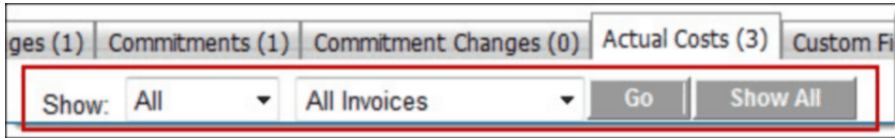
This page is displayed when line item numbers are selected on the Budget Details page. When the budget is approved, from here you have access to several details related to the budget line item, such as a financial summary that provides a snapshot of line item details. View and add notes, budget changes, commitments and more. When the budget is not yet approved you can edit line item details; modify line item custom fields if configured on account; attach documents, processes and forms.

Note: A New Line Item added to an Approved Budget cannot add money to the Budget. The amount of the change is reflected only through a budget change. For more information, see Add Budget Changes.

Fields, Buttons and Tabs

- **Edit Details:** Click to open the Add/Edit Line Item page and make changes to the details of the budget line item such as the description, funding rule or whether or not the line item is an allowance.
- **Financial Summary Tab:** This tab is selected by default when accessing this page. It provides a snapshot of the overall financial state of the budget line item. Details such as the original, approved budget changes and current budget amounts are provided along with commitment, commitment changes and actual cost item information.
- **Notes Tab:** Click this tab to add notes to the budget line item or view any existing notes there may be.
- **Budget Changes Tab:** Click this tab to view a list of budget changes associated with this particular budget line item. Click the budget change number to open the Budget Change Details page for more information about the change. Click the Excel icon to export data to a spreadsheet. Use the Show drop-down arrow to filter on the different budget change statuses.
- **Commitments Tab:** Click this tab to view a list of commitments against this particular budget line item. Click the commitment number to open the Commitment Details page for more information. Click the Excel icon to export data to a spreadsheet. Use the Show drop-down arrow to filter on the different commitment statuses.
- **Commitment Changes Tab:** Click this tab to quickly view commitment changes associated with the line item. The change number, change description, commitment number, description, company, status, and total change amount are available for viewing. Further detail on the commitment change can be accessed by clicking on the change number. Use the Show drop-down arrow to filter on the different commitment change statuses.
- **Actual Costs Tab:** Click this tab to view a list of commitment and general invoices processed against this budget line item and their status. The invoice number link opens the Invoice Details page, the commitment number opens the Commitment Details page and the company name link takes you to the Company Details page. Use the filter to narrow the results on the All Invoices table.

Click the Excel icon to export data to a spreadsheet.



- **Custom Fields Tab:** Click this tab to view a list of budget line item custom fields. These custom fields are added by the account administrator and are filled out when adding a budget line item. For more information on managing Cost custom field, see Cost Custom Fields.
- **Documents Tab:** Click this tab to attach documents to the budget line item or view any existing documents that may already be attached. If you have the proper permissions you can also remove attached documents from this tab.
- **Forms Tab:** Click this tab to attach forms to the budget line item or view any existing forms that may already be attached. If you have the proper permissions you can also remove attached forms from this tab.
- **Processes Tab:** Click this tab to attach processes to the budget line item or view any existing forms that may already be attached. If you have the proper permissions you can also remove attached forms from this tab.

Edit Line Item Details Page

The Edit Line Item Details page allows you to change the details of a budget line item. Once a line item amount has been added and approved, it cannot be changed. A budget change is required to make changes dollar to amounts. The details that can be modified are the account code, account description, and, if funding is enabled on the budget level, a different funding rule can also be added.

Fields and Buttons

A description of the fields and buttons located on this page is provided below:

- **Save:** Click to save changes.
- **Cancel:** Click to cancel changes. All unsaved changes will be lost.
- **Account Code:** Click to select a different account code to associate the budget line item to. If a text field displays, enter a description for this line item. The text field will appear only if the account code segment was not configured as a drop-down menu by your account administrator. For more information on this setting, see Manage Account Codes.
- **Description:** Enter a description for the budget line item in this field.
- **Assumption:** Enter an assumption in this field. An assumption refers to factors that were taken into account to arrive to the budget line item amount. For example, if the cost of lumber is \$45 per unit and estimate the 600 units will be needed.
- **Amount:** Displays the amount of the budget line item. This amount cannot be modified once approved. To change this amount, you must submit a budget change.

- **Funding Rule:** Displays only if funding is enabled on the budget level. Click this drop-down arrow to select a funding rule. Click the Add link to create a custom rule. For more information on this feature, see About Funding Rules.
- **Allow Charges:** Selected by default. If selected, invoices can be added toward this budget line item. If you clear this check box, you will not be able to add invoices toward this item.
- **Approval Required For Changes:** Select to require approval if this item is included in a net-zero budget change and the person submitting the change has Add/Edit Budget permissions, but not budget approval privileges. This setting coincides with the cost setting to allow users with add/edit budget permission to approve net \$0.00 budget changes. This check box must be selected on the account level in order for this to take effect on individual line items. See Cost Settings Page for instructions on accessing this page.
- **Custom Fields Tab:** Click to view a list of budget line item custom fields. These custom fields are added by the account administrator and are filled out when adding a budget line item. For more information on managing Cost custom field, see Cost Custom Fields.
- **Documents Tab:** Click to attach documents to the budget line item or view any existing documents that may already be attached. If you have the proper permissions you can also remove attached documents from this tab.
- **Forms Tab:** Click to attach forms to the budget line item or view any existing forms that may already be attached. If you have the proper permissions you can also remove attached forms from this tab.
- **Processes Tab:** Click to attach processes to the budget line item or view any existing forms that may already be attached. If you have the proper permissions you can also remove attached forms from this tab.

Add/ Edit Change Details Page

The Add/Edit Change Details page is displayed when adding or making changes to a budget change.

Fields and Buttons

A full description of the fields and buttons of this page is below:

- **Save and Add All Line Items:** Click to save changes and apply this budget change to all budget line items.
- **Save and Add Items One at a Time:** Click to save changes and apply this budget change to specific budget line items.
- **Cancel:** Click to cancel budget change modifications and return to the Budget Details page. All unsaved changes will be lost.
- **Project Name:** Displays the project name by default. Click to select a different project name.
- **Status:** Displays the status of the budget change.
- **Budget Change Number:** If the auto-fill feature is enabled in cost controls the budget number displays by default; otherwise, you must enter a budget change number in this field.

- **Date of Change:** If you are adding a new budget change, the present date displays by default; click the calendar icon to choose a different date. When editing the budget change, the date of change displays, but can also be modified.
- **Reason Code:** Click to select a budget change reason code.
- **Description:** Enter a description for the budget change in this field.
- **Custom Fields:** If budget change custom fields are available for your account, they display here. Custom fields are entered by the account administrator; for more information, see Cost Custom Fields.

Budget Change Details Page

This page is displayed when a budget change is selected on the Budget Details page. From here you can obtain detailed information about the selected budget change and take action on Draft status changes. If the budget change is in any status other than 'Approved', the page will display multiple statuses that you can move the budget change through. Once a budget change has been approved, the page will change to show only Mail Merge, Void and Edit action buttons. A quick cost summary as well as attached budget change items can be viewed from this page.

Regardless of the status of the budget change, you are always able to access the following:

- Custom Fields
- Notes
- Documents
- Forms
- Processes

Fields and Buttons

The fields and buttons located on this page are:

- **Mail Merge:** Click to open a mail merge document. In e-Builder, a mail merge document is a Microsoft Word® or PDF® print out of the data currently in view. Mail merge templates can be generic, providing just the data currently in view, or custom. If a template has not been created for your project, a generic printout opens. Custom templates provide additional cost data. These templates are created by your e-Builder Administrator and can be tailored with field mappings to capture very specific cost information. For more information, see Cost Mail Merge Templates.
- **Controlling Process:** Displays only if a cost process exists for the budget change. If the process is not yet completed (not in the approve or void status) it can only be updated in the process and not in the Cost module; in which case the action buttons (Make Pending, Make Projected, Edit, etc.) will not display.
- **Rescind Approval Req:** Click to negate a budget change approval request. This button will only display for the originator of the approval request after the request has been sent and before the approval has been granted.
- **Make Pending:** Click to change the status of the budget change to *pending*. This status is used to indicate when there is a likely change to an existing commitment or line item in the budget. By entering these items the team can gain visibility into any anticipated changes before they occur.

- **Make Projected:** Click to change the status of the budget change to *projected*. Projected is a status indicator that is available for commitment and budget changes. It is used to indicate when there is a possible change to an existing commitment or line item in the budget. By entering these items the team can gain visibility into any anticipated changes before they occur.
- **Request Approval:** Click to request a budget change approval.
- **Approve:** Click to approve a budget change request.
- **Edit:** Click to open the Add/Edit Change Details page and edit the details of the budget change.
- **Delete:** Displays for draft budget changes only. Click to delete the budget change.
- **Void:** Click to void an approved budget change. Approved changes cannot be deleted. To remove a change from the budget information, it must be voided.

Quick Cost Summary

The Quick Cost Summary details information about the Budget.

- **Current Budget:** This is the approved original budget and all approved budget changes.
 - **Current Commitments:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows: (approved commitment changes) + (original commitments) + (approved general invoices).
 - **Actuals Approved:** This is the amount of all approved invoices.
 - **Actual Costs To Complete:** This is the total invoice amount needed to fulfill all commitments. The formula is as follows: (projected commitments) (actuals approved).
 - **Available Funds:** This is the total amount of funds available in your funding sources.
- Note:** Funds are not depleted from the funding source until invoices have been approved. This total does not take into account invoices marked received.
- **Forecasted Over/(Under):** This figure represents an amount above or under the forecasted budget. This total is the difference between the estimate at completion and the current budget. The formula is as follows: (estimate at completion) (current budget). For more information on the forecasting utility, see Forecasting.

Budget Change Items Tab

This tab lists the budget line items linked to the budget change. Click the change number to open the Edit Budget Change Item page to modify details of the budget change item.

- **Add all line items:** Click to add all of the budget line items to this change.
- **Add Item:** Click to add specific budget line items to this change.
- **Microsoft Excel Icon @:** Click this icon to export budget change line items to a Microsoft Excel® spreadsheet.

Budget Changes Tab

This tab lists all recorded budget changes in all available statuses. Click a budget change number to open the Budget Change Details page and access additional information about the budget change.

- **Show:** Click to select an option to narrow budget changes in the results table below.
- **Mail Merge:** Click to open a mail merge document after making a selection.

In e-Builder, a mail merge document is a Microsoft Word® or PDF® print out of the data currently in view. Mail merge templates can be generic, providing just the data currently in view, or custom. If a template has not been created for your project, a generic printout opens. Custom templates provide additional cost data. These templates are created by your e-Builder Administrator and can be tailored with field mappings to capture very specific cost information. For more information, see Cost Mail Merge Templates.

- **Add Change:** Click to add a budget change. For more information about this procedure, see Add Budget Changes.
- **Microsoft Excel Icon** ®: Click this icon to export the budget line item to a Microsoft Excel® spreadsheet.

Custom Fields

If budget change custom fields have been created on the account, they display on this tab.

Notes Tab

Click this tab to view and add notes to the budget change.

Documents Tab

Click this tab to view, as well as attach any supporting files associated with the budget change. Once attached, other users can view and download these files.

- **View:** Click this link to view the file.
- **Download:** Click this link to download the file.
- **Redline:** Click this link to markup the file as you see fit.
- **Attach Documents:** Click to attach documents. For more information on this procedure, see Attach Documents to Budget/ Line Items.
- **Remove:** Click to remove file association after making a selection.

Forms Tab

Forms can be attached to the budget change details for additional backup information. From this tab you are able to view, fill out new forms, as well as attach any supporting forms associated with a change.

Note: Forms are permission driven. If a user does not have the permission level to view the form in the Forms module, they will not be able to view the Form attached to the Budget Details.

- **Fill Out Form:** Click to open the Fill out form on [Project Name] dialog box and select a form to complete. Posted forms also display on this tab for easy access.
- **Attach Forms:** Click to open the Attach Form on [Project Name] dialog box and attach existing form to the budget change.
- **Remove:** Click to remove file association after making a selection.

Processes Tab

- **Attach Processes:** Click to open the Attach Processes from [Project Name] dialog box and attach an existing process to the budget change.
- **Remove:** Click to remove file association after making a selection.

Edit Budget Change Item Page

The Edit Budget Change Item page allows you to modify the details of a budget change item.

Fields and Buttons

The fields and buttons located on this page are:

- **Save:** Click to save changes.
 - **Cancel:** Click to cancel changes to the budget change item. All unsaved changes will be lost.
 - **Budget Change Item Number:** This field displays the budget change number and may or may not be editable. To make this field editable, the Auto-fill budget change numbers when adding budget changes check box should be selected in the Cost Control Settings.
 - **Budget Line Item:** By default, the budget line item this change item is associated with displays in this field. Click the drop-down arrow to select a different budget line item.
 - **Current Budget Amount:** This is the approved original budget and all approved budget changes.
 - **Description:** By default, the budget line item description displays in this field. This is an editable field so you can enter a different description if desired.
 - **Funding Rule:** If funding is enabled on the budget level, this field displays the funding rule used for this budget line item. Click this link to open the Funding Source Distribution dialog box to see the breakdown of the funding rule.
 - **Project Number:** If available, the project number displays in this field. This is a feature that can be configured by the account administrator and will not automatically appear on every account.
 - **Budget Change Number:** The budget change number displays in this field.
 - **Change Amount:** Enter the total amount of the budget change item in this field.
 - **Projected Commitments:** This field displays the amount of projected commitments.
- Use Case:** If the budget is controlled by the line item, knowing the amount of your projected commitments will help you not exceed this quantity when entering your budget change item amount.

Commitments

The commitments cost entity is only available for approved budgets. A verbal or documented agreement to purchase something from a seller is considered a commitment in e-Builder. Whether or not this promise or agreement has an actual purchase associated with it or not, it can be entered into e-Builder as a draft and go through different statuses as the planning, purchase and approval process gets underway. The most common types of commitments are contracts and purchase orders. The Commitments page provides an overview of a project's budget from the perspective of all commitments that have been entered (projected, pending, approved etc.)

Tip

Many of the procedures related to commitments can be performed by way of an automated cost process. See About Cost Processes for more information.

To guide you through working with commitments in the Cost module, the following sections are included:

Working with Commitments

- Add Commitments
- Edit Commitment Details
- Add Commitment Line Items
- Request Commitment Approval
- Approve Commitments
- Void Commitments
- Close Commitments
- Reopen Closed Commitments
- Print a Commitment Mail Merge Template
- Export Commitments to Spreadsheet
- Add Notes to Commitments
- Attach Documents to Commitments
- Attach Forms to Commitments
- Attach Processes to Commitments

Working with Commitment Changes

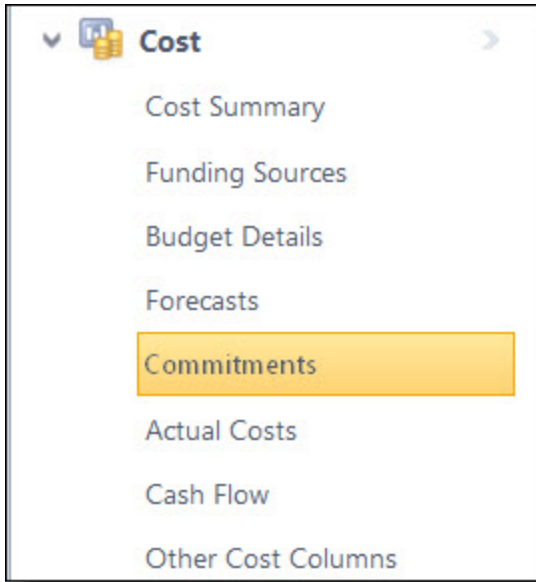
- Add Commitment Changes
- Add Commitment Change Items
- Edit Commitment Changes
- Make a Commitment Change Projected
- Make a Commitment Change Pending
- Request Commitment Change Approval
- Approve Commitment Changes
- Reject Commitment Changes
- Void Commitment Changes
- Delete Commitment Changes
- Add Notes to Commitment Changes
- Attach Documents to Commitment Changes
- Attach Forms to Commitment Changes
- Attach Processes to Commitment Changes

Access the Commitments Page

To access the Commitments page

1. Go to the Cost Summary page.
For more information, see [Access the Project Cost Summary Page](#).

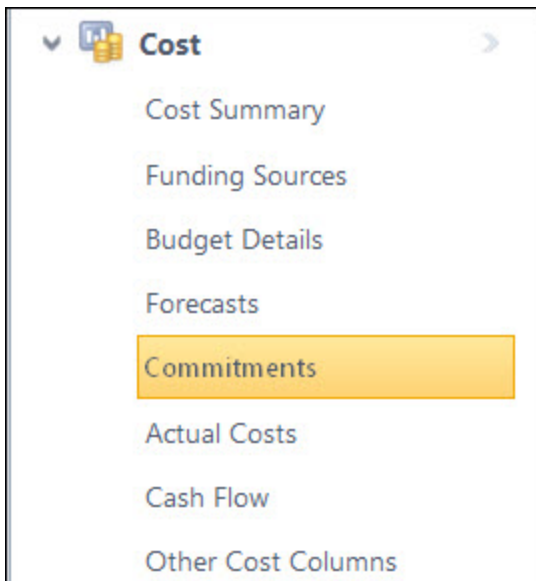
2. Click the **Commitments** link located in the left navigation bar.



Access the Commitment Details Page

To access the Commitment Details page

1. Go to the Cost Summary page.
For more information, see Access the Cost Summary Page.
2. Click the **Commitments** link located in the In the left navigation bar.



The Commitments page is displayed.

3. Click the commitment number or description of the commitment.

The Commitment Details page is displayed.

Import Commitments

Note: Depending on your account settings you may or may not be able to import commitments. The Cost import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager. Once the option is available, only users with Import permissions can perform this task.

To import commitments

1. Click **Cost** from the top navigation tabs.
2. Click the **Data Entry** link located on the shortcut links at the top.
The Data Entry Menu page is displayed.
3. Click **Import Commitments**.
The Import Commitments page (Step 1 of 3) displays.
4. Complete all required fields.
For detailed descriptions of the field and buttons located on this page, see Import Commitments Page Overview.
5. Click **Next**.
Step 2 of 3 displays.
6. Complete all required fields.
7. Click **Next**.
Step 3 of 3 displays.
8. If the file was mapped correctly and there aren't any exceptions or warning, click **Import**.
—Or—
If there are exceptions, the Import button is disabled. Click the Exceptions tab to review the exceptions and make any necessary changes to the spreadsheet. Click **Previous** to reimport the file, and then repeat steps 5-7.

Add Commitments

To add a commitment

1. Go to the Commitments page.
For more information, see Access the Commitments Page.
2. Click **Add Commitment**.
The Add Commitment page is displayed.
3. Enter all required fields.
For a detailed description of all the fields and buttons located on this page, see Add/Edit Commitment Page Overview.
4. *Optional:* You can add commitment line items at this time.

—Or—

Click **Save** to add line items at a later time.

Note: This commitment is saved in Draft status.

Add Master Commitments

To add a commitment

1. Click **Cost** from the Top Navigation Menu.
2. Click the **Master Commitments** tab.
3. Click **Add Master Commitment**.

The Add Master Commitment popup is displayed.

4. Select where the master commitment should be created (under a process or standard cost module).
5. Click **Create**. The Add Master Commitment page is displayed.
6. Enter all required fields.

For a detailed description of all the fields and buttons located on this page, see [Add/Edit Master Commitment Page Overview](#).

7. *Optional:* You can add new master commitment line items at this time.

—Or—

Click **Save** to add line items at a later time.

Note: This master commitment is saved in **Draft** status.

Edit Commitment Details

The details of a commitment such as the commitment type, description, company, retainage etc. can be changed even after the commitment has been approved. If the account is not configured to auto-populate commitment numbers, this information can be modified as well. Additional line items can be added as well.

Note: A commitment change is required to modify line item amounts of an approved commitment.

To edit commitment details

1. Go to the Commitment Details page.
For more information, see [Access the Commitment Details Page](#).
2. Click **Edit**.
3. Make changes to any of the editable commitment details.
4. *Optional:* If this is a draft commitment, you can take any of the following actions from here:
 - Add Commitment Line Items
 - Add Commitment Line Item Custom Fields

Note: Commitment items can also be added at a later time.

5. Click **Save**.

Add Commitment Line Item Custom Fields

If your administrators have defined commitment line item custom fields (CLICF), you are able to complete these fields when completing any of the following procedures:

- Adding Commitments (optional or required custom fields)
- Adding Commitment Line Items (optional custom fields only)
- Editing Commitment Details (optional or required custom fields)

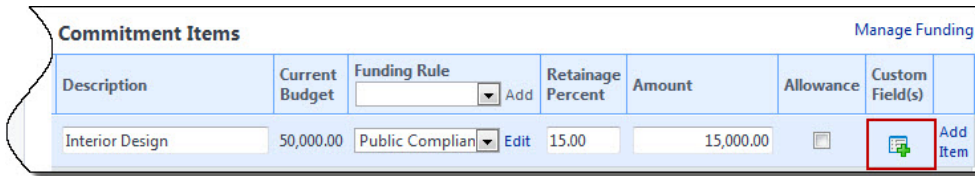
Optional custom fields can be completed whenever line items are entered, but required custom fields must be completed before a commitment can be saved, whether adding line items or not.

CLICF can be added on any of the following pages:

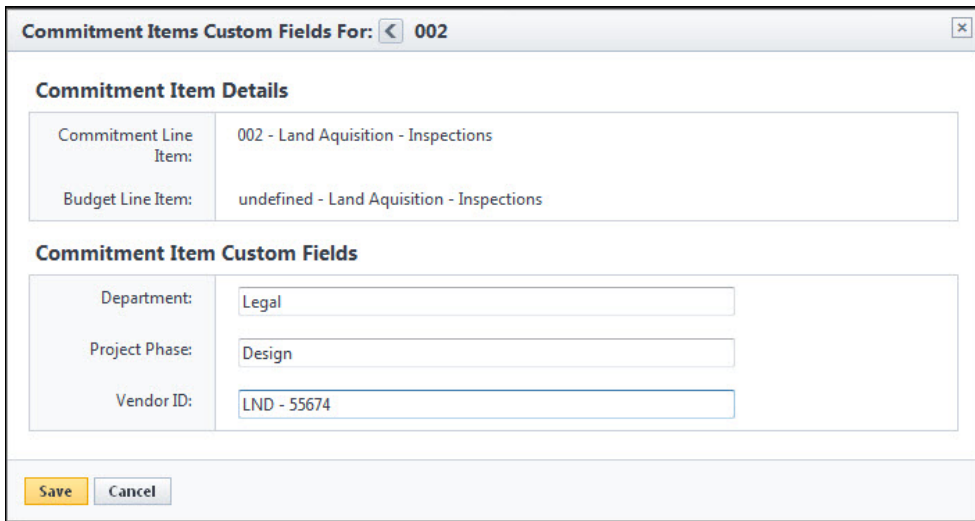
- Add/Edit Commitment Page
- Commitment Details Page
- Add/Edit Commitment Item Page

To enter commitment item custom fields

1. Click the add custom field icon ().



The Commitment Items Custom Fields dialog box displays.



2. Complete commitment item custom fields.
3. Click **Save**.

Add Commitment Line Items

Commitment line items can be added at any time. If a commitment has already been approved, however, line item amounts can only be added via a commitment change. Please be aware that line items can also be added while doing the commitment change to avoid having to do two separate processes or adding the line item first, and then the change; for detailed steps, see Add Commitment Changes.

To add commitment line items

1. Go to the Commitment Details page.
For more information, see Access the Commitment Details Page.
2. Click **Edit**.
The Edit Commitment page is displayed.
3. Scroll down to the **Commitment Items** section, and then click **Please Select A Line Item**.
The Budget Line Items dialog box displays.
4. Click the account code link of the budget line item you'd like to add.
Your selection is populated in the **Commitment Items** section.
Note: By default the commitment line item will inherit the funding rule assigned to the associated budget line item. You can choose to update the rule and set it to any allocation, as long as it adds up to 100%. Click the Edit link to edit the inherited rule.
5. If you are tracking funding at the commitment level you are required to select a funding rule.
If a funding rule does not automatically populate, click the **Funding Rule** drop-down arrow to select a funding rule or click the **Edit** link to enter a custom rule. Funding allocations must add up to 100%.
6. If configured, you can optionally enter a retainage percentage for each line item.
In the **Retainage Percent** column, enter a retainage percent.
7. In the **Amount** column, enter the amount of the commitment item.
Note: This option is only available for non-approved commitment line items. Changes to approved amounts must be done via a commitment change.
8. If this commitment item is an allowance, select the **Allowance** check box.
An allowance is money set aside for a particular purpose, but the details of pending expenditures is still unknown. For more information on how allowances work, see Add/Edit Commitment Page Overview.
9. To add additional line items, click the **Add** link, and then repeat steps 4-9.
—Or—
Click **Save**.

Request Commitment Approval

Once entered, commitments are saved as drafts. If you do not have approval permissions, a commitment approval request is required.

Note: If funding rules are enabled on the account, you are not able to action a commitment (i.e. request approval) until a funding rule is selected.

To request a commitment approval

1. Go to the Commitment Details page. For more information, see [Access the Commitment Details Page](#).
2. Click **Request Approval**. The approval is sent to users with Approve Final Commit permission for further action.

Approve Commitments

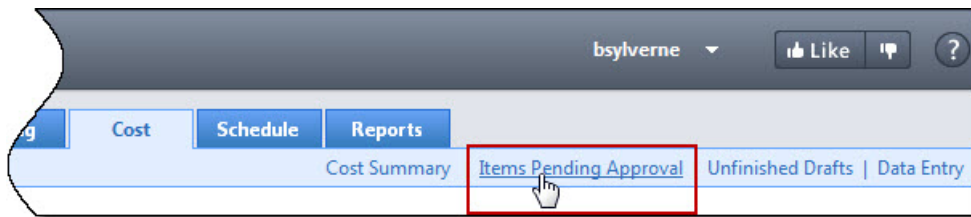
Commitments can only be approved by users with Approve Final Commit permissions; for more information, see [Manage Permissions](#).

Note:

- Money cannot be added to a commitment once it is approved. A commitment change is required to make any changes to approved amounts.
- Once a commitment has been approved it cannot be deleted; it has to be voided to be removed from the budget.

Tip

- Commitment approvals can also be done via a cost process. See [About Cost Processes](#) for more information.
- Click the [Items Pending Approval](#) link located toward the top of the page to view a list of all cost items that are pending your approval. This quick link can be accessed regularly to stay abreast of pending approvals throughout the Cost module. An [Items Pending Approval](#) section is also located on the Home tab for your convenience.



To approve commitments

1. Go to the Commitment Details page.
For more information, see [Access the Commitment Details Page](#).
2. Click **Approve**.
You are prompted to enter an approval date and add a note.
3. Click the current date link to insert today's date into the field, or enter a different date in the **Approval Date** field.
4. Click **Yes, Approve Commitment**.
The newly added commitment is reflected in the Financial Summary and in the Commitments Quick Cost Summary.

Related Topics:

- Void Commitments
- Close Commitments
- Reopen Closed Commitments
- Add Commitments
- Edit Commitment Details
- Add Commitment Line Items

Void Commitments

If an approved commitment was added or approved in error, the only way to remove it from the budget and Commitments page is to void it. However, if you want to void a commitment that has commitment changes and invoices, you must void the invoices and commitment changes before you can void the commitment.

Note: Only users with the Add/Edit Commitment permission can void commitments.

To void a commitment

1. Go to the Commitment Details page.
For more information, see [Access the Commitment Details Page](#).
2. Click **Void**.
You are prompted for confirmation.
3. Click **Continue**.

Related Topics:

- Approve Commitments
- Close Commitments
- Reopen Closed Commitments
- Add Commitments
- Edit Commitment Details
- Add Commitment Line Items

Close Commitments

Once all actuals (invoices) have been applied against a commitment, it can be closed and removed from the Commitment Details page. If necessary, closed commitments can be reopened at a later date under certain conditions.

Best Practice: If there are remaining funds that have not been approved, complete a change to return the funds to the budget as uncommitted.

To close a commitment

1. Go to the Commitment Details page.
For more information, see [Access the Commitment Details Page](#).
2. Click **Close**.

Caution: If there are unapproved invoices or line items associated with the commitment, a caution message displays. You will not be able to add commitment changes or invoices against the commitment after it's been closed.

3. Click **Yes, Close the Commitment**.

Reopen Closed Commitments

If a commitment was closed in error or it is later determined that additional actual (invoices) or change items should be applied to the commitment, it can be reopened. Reopening a commitment will return it to the approved status.

To reopen a closed commitment

1. Go to the Commitments page.

For more information, see [Access the Commitments Page](#).

Tip

Use the filter to narrow results to show only Closed commitments. This will help you access the desired commitment more easily. Click the Show drop-down arrow and select Closed, and then click Go.



2. Click the commitment number or description of the commitment you want to reopen.
The Commitment Details page displays.
3. Click **Re-Open**.
You are prompted for confirmation.
4. Click **Yes, Re-Open the Commitment**.

Print a Commitment Mail Merge Template

Information about a commitment can be printed to a custom template created by the account administrator. Mail merge templates may be in Microsoft Word® or Adobe PDF® formats, as configured by your e-Builder admin. For more information on cost mail merge templates including customizations, see [Cost Mail Merge Templates](#). To export commitments to a spreadsheet, see [Export Commitments to Spreadsheet](#).

To generate a commitment mail merge

1. Go to the Commitments page.
For more information, see [Access the Commitments Page](#).
2. Select the check box next to the commitment item.
3. Click **Mail Merge**.
The Select Mail Merge Template displays.
4. If only one template displays for you to choose from, go to the next step. If there are multiple templates

available, make a selection.

5. Click **Continue**.

Export Commitments to Spreadsheet

The Export to Excel® functionality gives you the ability to export select commitments to a Microsoft Excel® spreadsheet.

To export commitments to a spreadsheet


1. Go to the Commitments page.

For more information see [Access the Commitments Page](#).

Tip

Use the filter to narrow results. This will help you access the desired commitments more easily.



2. Click the Export to Excel icon ()

The File Download dialog box displays.

3. Click **Open**, **Save**, or **Cancel**.

Add Notes

The Notes tab allows users to quickly add notes of importance. Notes allow all team members who have the permission to see the communication. For each note entered, the first and last name and company name of the user will be displayed along with the date. Contained within the tab, in parenthesis, e-Builder displays the total number of notes created.

To add notes

1. On the **Notes** tab, click **Add**.
The Add Note page is displayed.
2. Enter the note in the **Note** field.
3. If the **Private** check box is available, you can select it to hide your note from other team members.
4. Click **Save**.

Attach Documents to Commitments

You have the ability to view, attach or remove attached documents.

To attach documents

1. Go to the Commitment Details page.
For more information, see [Access the Commitment Details Page](#).
2. Click the **Documents** tab.
3. Click **Attach Documents**.

The Attach Documents dialog box displays.

4. In the **Select Attachment Method** section, select your method of attachment.
5. Click **Browse For Files...**
6. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
7. If you are attaching files from e-Builder, go to step 9.

—Or—

If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.

8. Search for and select the e-Builder destination folder.
9. Click **Attach Selected**.

Attach Forms to Commitments

You have the ability to attach and remove attached forms from a commitment in the event the form was attached in error.

Note: Forms are permission driven. If a user does not have the permission level to view the form in the Forms module, they will not be able to view the Form attached to the commitment.

To attach forms to a commitment

1. Go to the Commitment Details page.
For more information, see [Access the Commitment Details Page](#).
2. Click the **Attached Forms** tab.
3. Click **Attached Forms**.
The Attach Forms from [Project Name] filter displays.
4. Filter for the forms you want to see.
Results display in the table below.
5. Select the check box next to the form(s) you want to attach.
6. Click **Attach**.

Attach Processes to Commitments

To attach processes to a commitment

1. Go to the Commitment Details page.
For more information, see [Access the Commitment Details Page](#).
2. Click the **Processes** tab.
3. Click **Attach Processes**.
The Attach Processes from [Project Name] filter displays.
4. Filter for the processes you want to see.

Results display in the table below.

5. Select the check box next to the process(es) you want to attach.
6. Click **Attach**.

Working with Commitment Changes

Once a commitment has been approved, additional funds/line items cannot be added to it. As a project progresses and unforeseen situations need to be accounted for, commitment changes will be needed to adjust to these changes.

Tip

- Commitment changes are an effective way to move money from one contract to another, such as from Contingency to Construction Reimbursable. Create a commitment change with a negative line item to take money out of one area and a positive line item for the same amount to move it. The overall budget amount will not change and you're able to allocate funds to the appropriate areas.
- Many of the procedures related to commitments can be performed by way of an automated cost process. See [About Cost Processes](#) for more information.

There are a number of actions you can take regarding commitment changes. Below is a list of tasks for working with commitment changes:

- Import Commitment Changes
- Add Commitment Changes
- Add Commitment Change Items
- Edit Commitment Changes
- Make a Commitment Change Projected
- Make a Commitment Change Pending
- Request Commitment Change Approval
- Approve Commitment Changes
- Reject Commitment Changes
- Void Commitment Changes
- Delete Commitment Changes
- Add Notes to Commitment Changes
- Attach Documents to Commitment Changes
- Attach Forms to Commitment Changes
- Attach Processes to Commitment Changes

Access the Commitment Change Details Page

To access the Commitment Change Details page

1. Go to the Commitment Details page.
For more information, see [Access the Commitments Details Page](#).
2. Click the **Commitment Changes** tab.

3. Click the commitment change number link.
The Commitment Change Details page is displayed.

Import Commitment Changes

Note: Depending on your account settings you may or may not be able to import commitment changes. The Cost import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager. Once the option is available, only users with Import permissions can perform this task.

To import commitment changes

1. Click the **Data Entry** link located in the Top Navigation Tabs.
The Data Entry Menu page is displayed.
2. Click **Import Commitment Changes**.
The Import Commitment Changes page (Step 1 of 3) displays.
3. Complete all required fields.
For detailed descriptions of the field and buttons located on this page, see Import Commitment Changes Page Overview.
4. Click **Next**.
Step 2 of 3 displays.
5. Complete all required fields.
6. Click **Next**.
Step 3 of 3 displays.
7. If the file was mapped correctly and there aren't any exceptions or warning, click **Import**.
—Or—
If there are exceptions, the Import button is disabled. Click the Exceptions tab to review the exceptions and make any necessary changes to the spreadsheet. Click **Previous** to reimport the file, and then repeat steps 5-7.

Add Commitment Changes

Once a commitment has been approved, additional funds/line items cannot be added to it, and a commitment change is required to edit the commitment. If the change is deleted before being approved, additional items added to it will also be removed from the commitment. However, if the commitment change is approved, additional items become part of the commitment and will always be linked to the commitment.

Tip

Commitment changes are an effective way to move money from one contract line to another, such as from Contingency to Construction Reimbursable. Create a commitment change with a negative line item to take money out of one area and a positive line item for the same amount to move it. The overall budget amount will not change and you'll be able to allocate funds to the appropriate areas.

To add a commitment change

1. Go to the Commitment Details page.

For more information, see [Access the Commitment Details Page](#).

2. Click the **Commitment Changes** tab.
3. Click **Add Change**.

The Add Change Details page is displayed.

4. Enter all required fields.

For detailed information about the fields and buttons on this page, see [Add/Edit Change Details Page Overview](#).

Note: Commitment changes can be added and saved with or without line items during the first instance of adding the change. Commitment items can be added to the commitment change at a later time via editing the commitment change, it's up to you.

Tip

New commitment items can be entered in e-Builder while adding a commitment change. This way, if a change is required for a new commitment, you will not have to complete two separate tasks of adding a commitment first, and then adding a commitment change against it.

5. Click **Save and Add All Items** to add all commitment items to the change. You are prompted for confirmation. Click **Continue**. Add Commitment Change Item page is displayed.

—Or—

Click **Save and Add Items One at a Time** to choose the commitment items to add to the change. The Add Commitment Change Item page is displayed.

6. If you choose to add commitment line items at another time, click **Cancel**.

The Commitment change is saved as a draft and you can add items to it at a later time by editing the commitment change.

—Or—

[To continue with this process, enter all required fields. For detailed information about the fields and buttons on this page, see \[Add/Edit Commitment Change Item Page Overview\]\(#\).](#)

7. Click **Save** or **Save & Add New**.

Add Master Commitment Changes

Once a master commitment has been approved, additional funds/line items cannot be added to it, and a commitment change is required to edit the commitment. If the change is deleted before being approved, additional items added to it will also be removed from the commitment. However, if the commitment change is approved, additional items become part of the commitment and will always be linked to the commitment.

Tip

Commitment changes are an effective way to move money from one contract line to another, such as from Contingency to Construction Reimbursable. Create a commitment change with a negative line item to take money out of one area and a positive line item for the same amount to move it. The overall budget amount will not change and you'll be able to allocate funds to the appropriate areas.

[To add a master commitment change](#)

1. Click Cost from the Top Navigation Menu.
2. Click the **Master Commitment Changes** tab.
3. Click **Add Master Commitment Change**.
The Add Master Commitment Change page is displayed.
4. Enter all required fields.

Note: Commitment changes can be added and saved with or without line items during the first instance of adding the change. Commitment items can be added to the commitment change at a later time via editing the commitment change, it's up to you.

Tip

New commitment items can be entered in e-Builder while adding a commitment change. This way, if a change is required for a new commitment, you will not have to complete two separate tasks of adding a commitment first, and then adding a commitment change against it.

5. Click **Save and Add All Items** to add all commitment items to the change. You are prompted for confirmation. Click **Continue**. Add Commitment Change Item page is displayed.

—Or—

Click **Save and Add Items One at a Time** to choose the commitment items to add to the change. The Add Commitment Change Item page is displayed.

6. If you choose to add commitment line items at another time, click **Cancel**. The Commitment change is saved as a draft and you can add items to it at a later time by editing the commitment change.

—Or—

To continue with this process, enter all required fields.

7. Click **Save** or **Save & Add New**.

Add Commitment Change Items

Change items can be added to a commitment change at any time, before the change is approved. You may need to add additional items to a change or maybe the change before items could be added to it.

To add change items to a commitment change

1. Go to the Commitment Change Details page.
For more information, see [Access the Commitment Change Details Page](#).
2. To add all commitment items to the change, click **Add all line Items**.
You are prompted for confirmation, click **Continue**.
Or, to add a single line item at a time click **Add Item**.
The Add Commitment Change Item page is displayed.
3. Enter all required fields.
For detailed information about the fields on this page, see [Add/Edit Commitment Change Item Page Overview](#).
4. Click **Save & Add New** or **Save**.

Edit Commitment Changes

When you edit a commitment change, you have the flexibility to make all changes to the commitment at once, saving you valuable time. Additionally, you can make edits to both the commitment change and the commitment item itself in one pass, a tremendous time saver, and a great help in avoiding keystroke errors.

In this procedure you also have the opportunity to take action on the change (request approval, approve, make pending/projected, etc.) and also make changes to details of the change such the reason code, change number or description).

To edit commitment changes

1. Go to the Commitment Change Details page.

For more information, see [Access the Commitment Change Details Page](#).

2. Click **Edit**.

The Edit Change Details displays with editable fields

3. Make changes to any of the **Edit Change Details** fields.

For detailed information about the fields and buttons located on this page, see [Add/Edit Change Details Page Overview](#).

You can optionally take any of the following actions from this page:

- Add Commitment Change Items
- Manage Funding Distribution

To Add a Commitment Change Item

4. Click **Please Select A Line Item**.

The Line Item dialog box displays for you to make a selection.

5. Click the account code number of the budget line item you'd like to add this change item to.

Although editable, the description of the account code/budget line item is auto-populated.

Note: If funding sources are enabled on the account, you will notice that the budget line item funding rule automatically populates. Click the Funding Rule drop-down arrow to change this rule or click the Add link to create a custom rule for this commitment change item.

6. In the **Change Amount** field, enter the change amount of the change item.
7. To add additional items to this change, click the **Add Item** link, and then repeat steps 4-6.
8. Click **Save**.

Make Commitment Change Projected

A Projected status is used when a change is expected but has not been finalized. If the project cost summary view is configured to display the corresponding columns, this status change will be reflected there.

To change the status of a commitment change to projected

1. Go to the Commitment Change Details page.

For more information, see [Access the Commitment Change Details Page](#).

2. Click **Make Projected**.

The Return to Draft button appears which allows you to rescind this action if necessary.

Make Commitment Change Pending

The Pending status is a way to communicate to all users that a Commitment Change is expected but not finalized. For example, a verbal confirmation of a contract that is awaiting final signatures may qualify as a pending change. If the project cost summary view is configured to display the corresponding columns, this status change will be reflected there.

To change the status of a commitment change to pending

1. Go to the Commitment Change Details page.

For more information, see [Access the Commitment Change Details Page](#).

2. Click **Make Pending**.

The Return to Draft button appears which allows you to rescind this action if necessary.

Request Commitment Change Approval

Based on permissions granted to you by the e-Builder Administrator, some commitment changes may require approval before the change is accepted into the budget.

To request a commitment change approval

1. Go to the Commitment Change Details page.

For more information, see [Access the Commitment Change Details Page](#).

2. Click **Request Approval**.

The approval is sent to users with Approve Commit Changes permissions for further action.

Related Topics:

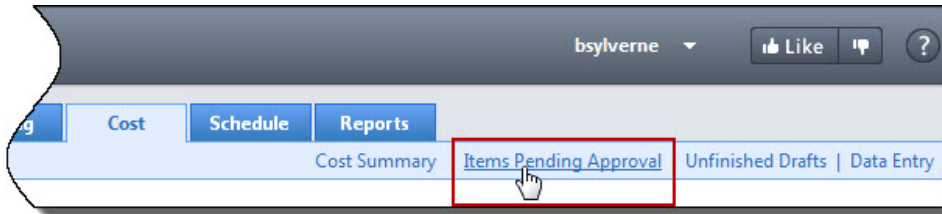
- [Manage Permissions](#)

Approve Commitment Changes

Once a commitment change has been approved, it can no longer be deleted; but must be voided to be removed from the budget.

Tip

- Commitment change approvals can also be done via a cost process. See [About Cost Processes](#) for more information.
- Click the Items Pending Approval link located toward the top of the page to view a list of all cost items that are pending your approval. This quick link can be accessed regularly to stay abreast of pending approvals throughout the Cost module. An Items Pending Approval section is also located on the Home tab for your convenience.



To approve a commitment change

1. Go to the Commitment Change Details page.
For more information, see [Access the Commitment Change Details Page](#).
2. Click **Approve**.

Reject Commitment Changes

Approval requested commitment changes can either be approved or rejected. Although you must have the proper permissions to reject a commitment change they can also be rejected by the person that initiated it by clicking the **Rescind Approval Req** button located on the Commitment Change Details page. Notably, this button will only be present for the originator of the change approval request.

To reject a commitment change

1. Go to the Commitment Change Details page.
For more information, see [Access the Commitment Change Details Page](#).
2. Click **Reject**.
You are prompted for confirmation.
3. If necessary, enter a note.
4. Click **Continue**.

Void Commitment Changes

Commitment changes that are in the Approved status cannot be deleted, but they can be voided. Voiding a commitment change removes it from the current Budget information.

Note: Only users with the Add/ Edit Commitment permission can void commitment changes.

To void a commitment change

1. Go to the Commitment Change Details page.
For more information, see [Access the Commitment Change Details Page](#).
2. Click **Void**.
The Confirm Void dialog box displays.
3. Click **Continue**.

Delete Commitment Changes

Commitment change items can only be deleted in the Draft, Pending or Projected status. Once it has been approved it must be voided.

To delete a commitment change

1. Go to the Commitment Change Details page.
For more information, see [Access the Commitment Change Details Page](#).
2. Click **Delete**.

Add Notes

The Notes tab allows users to quickly add notes of importance. Notes allow all team members who have the permission to see the communication. For each note entered, the first and last name and company name of the user will be displayed along with the date. Contained within the tab, in parenthesis, e-Builder displays the total number of notes created.

To add notes

1. On the **Notes** tab, click **Add**.
The Add Note page is displayed.
2. Enter the note in the **Note** field.
3. If the **Private** check box is available, you can select it to hide your note from other team members.
4. Click **Save**.

Attach Documents to Commitment Changes

You have the ability to view, as well as attach any supporting documents associated with the commitment change. Once attached, other users can view and download these files. You may choose to attach files in order to have an electronic version of an original commitment, contract or invoice readily accessible for review.

To view/attach documents to commitment changes

1. Go to the Commitment Change Details page.
For more information, see [Access the Commitment Change Details Page](#).
2. Click the **Documents** tab.
3. Click **Attach Documents**.
The Attach Documents dialog box displays.
4. In the **Select Attachment Method** section, select your method of attachment.
5. Click **Browse For Files...**
6. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
7. If you are attaching files from e-Builder, go to step 9.
—Or—

If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.

8. Search for and select the e-Builder destination folder.
9. Click **Attach Selected**.

Attach Forms to Commitment Changes

To attach forms to a commitment change

1. Go to the Commitment Change Details page.
For more information, see [Access the Commitment Change Details Page](#).
2. Click the **Attached Forms** tab.
3. Click **Attached Forms**.
The Attach Forms from [Project Name] filter displays.
4. Filter for the forms you want to see.
Results display in the table below.
5. Select the check box next to the form(s) you want to attach.
6. Click **Attach**.

Attach Processes to Commitment Changes

To attach processes to a commitment change

1. Go to the Commitment Change Details page.
For more information, see [Access the Commitment Change Details Page](#).
2. Click the **Processes** tab.
3. Click **Attach Processes**.
The Attach Processes from [Project Name] filter displays.
4. Filter for the processes you want to see.
Results display in the table below.
5. Select the check box next to the process(es) you want to attach.
6. Click **Attach**.

Commitments Page Overview

The Commitments page helps you manage your project commitments. This page provides an overview of the project's budget in terms of the commitments that have been made, those pending and projected. From here you can add / view commitments and their statuses. A detailed description of the fields and buttons located on this page is provided in the table below.

Commitment Summary

The Commitment Summary gives you a snapshot of the project's commitments to date.

Quick Cost Summary

The Quick Cost Summary is a common component throughout the Cost module and it's an effective way to navigate between various areas of a project's budget including funding sources, invoices, budget commitment details and more. It offers a more condensed, yet comprehensive view of the budget, providing current status of the original budget, current commitments and invoices paid to date.

- **Current Budget:** The approved original budget and all approved budget changes.
 - **Current Commitments:** The amount of all approved commitment changes plus original commitments, and approved general invoices. Current Commitments = approved commitment changes + original commitments + approved general invoices.
 - **Actuals Approved:** The amount of all approved invoices.
 - **Actual Cost to Complete:** The total invoice amount needed to fulfill all commitments. Actual Cost to Complete = projected commitments x actuals approved.
 - **Available Funds:** The total amount of funds available in your funding sources.
- Note:** Funds are not depleted from the funding source until invoices have been approved. This total does not take into account invoices marked received.
- **Forecasted Over/ (Under):** Represents an amount above or under the forecasted budget. This total is the difference between the estimate at completion and the current budget. Forecasted Over / Under = estimate at completion x (current budget). For more information on the forecasting utility, see Forecasting.

Commitment Results Table

By default, this table is titled All Commitments, but the title will change according to what is selected in the filter. This results table provides an overview of project commitments.

Toolbar

Filter: At any given time, a project's commitments can be vast, making the All Commitments table very compact and difficult to search through. The filter allows you to narrow table results by commitment status and/ or commitment type.

The toolbar contains the following elements from left to right:

- The text "Show:" followed by a dropdown menu currently displaying "All".
- A second dropdown menu currently displaying "All Commitments".
- A "Go" button.
- A "Show All" button.

- **All:** Select commitment statuses to filter by.
- **All Commitments:** Select commitment types to filter by.
- **Go:** Displays results in the table below.
- **Show All:** Resets the filter and displays all available commitments.

Mail Merge: Opens a mail merge document after making your selection(s). In e-Builder, a mail merge document is a Microsoft Word® or PDF® print out of the data currently in view. Mail merge templates can be generic, providing just the data currently in view, or custom. If a template has not been created

for your project, a generic printout opens. Custom templates provide additional cost data. These templates are created by your e-Builder Administrator and can be tailored with field mappings to capture very specific cost information. For more information, see Cost Mail Merge Templates.

Add: Adds commitments. See Add Commitments for detailed steps.

Note: Only users with add or edit commitment permissions can access the Add or Edit Commitment page.

Export to Excel®: Click this icon to send the current table view of commitments to an Excel spreadsheet.

Columns

- **#:** The commitment number. Click this link to view detailed information or take action on the commitment.
- **Description:** The description of the commitment. Click this link to view detailed information or take action on the commitment.
- **Company:** The name of the company the commitment was made to. Click this link to view more detailed information about the company.
- **Date:** The date the commitment was entered into the system.
- **Status:** The status of the commitment.
- **Commitment Type:** The commitment type. Commitment types are entered by the e-Builder Administrator. For more information, see Commitment Types.
- **Commitment Amount:** If the commitment is approved, it displays the original commitment amount. If the commitment is in draft or pending status, this is the anticipated commitment amount.
- **Current Commitment:** The total amount of approved commitments (Original Commitment + Approved Changes)
- **Projected Commitment:** The amount of projected commitments (Current Commitments + Pending/ Projected Commitment Changes).
- **Actuals Approved:** The total value of all Approved Invoices against the Commitment.
- **Remaining Balance** The difference between Current Commitment and Actuals Approved.

Commitment Details Page

The toolbar buttons, tabs and fields on this page are:

Toolbar Buttons

- **Mail Merge:** Click to open a mail merge document. In e-Builder, a mail merge document is a Microsoft Word® or PDF® print out of the data currently in view. Mail merge templates can be generic, providing just the data currently in view, or custom. If a template has not been created for your project, a generic printout opens. Custom templates provide additional cost data. These templates are created by your e-Builder Administrator and can be tailored with field mappings to capture very specific cost information. For more information, see Cost Mail Merge Templates.

- **Request Approval:** Click to request a commitment approval. For detailed steps for this procedure, see Request Commitment Approval.
- **Approve:** Displayed for users with Approve Final Commit permissions. Click to approve a commitment. For instruction, see Approve Commitments.
- **Make Pending:** Click to change the status of the commitment to pending. Moving a commitment into the pending status will inform users that a future commitment is being finalized.
- **Delete:** Displayed for drafts commitments only. Approved commitments cannot be deleted; they must be voided in order to be removed from the budget. Click to delete a draft commitment.
- **Edit:** Click to edit the details of the commitment. For detailed steps on this procedure, see Edit Commitment Details.
- **Void:** Displayed only for approved commitments that do not have any invoices associated with it. Click to void a commitment that was approved in error. Voiding the commitment will effectively remove it from the budget. For detailed steps on this procedure, see Void Commitments.
- **Close:** Displayed for approved commitments only. Click to close a commitment. Commitments should be closed after all actuals (invoices) have been applied to it. Once selected, this button is replaced by the Re-Open button, which allows you to reopen the commitment if necessary. For detailed steps on this procedure, see Close Commitments.
- **Re-open:** Displayed for closed commitments. Click to re-open a closed commitment, which will allow you to add change items and invoices to it. For detailed steps on this procedure, see Reopen Closed Commitments.

Commitment Overview Tab

This tab gives you a quick overview of commitment. Use this tab to glean general and basic information about the commitment such as the status, the commitment control, approval date etc. The left and right arrows in the Commitment Number field allow you to skip to the next or previous commitment on the project in sequential order, based on how the commitments are displayed on the Commitments Page.

Other Details Tab

This tab provides additional information about the commitment with a little bit more detail as compared to the Commitment Overview tab. Click this tab to view the following fields:

- Commitment Date
- Notice to Proceed Date
- Scope of Work
- Default Retainage Percent
- Support Manual Retainage: Indicates whether the manual override of the retainage amounts on invoice line items has been enabled or not.

Financial Summary Tab

This tab provides a focus on the numbers. The financial summary of the commitment is compiled here for quick and convenient access. A comparison of original values, pending, projected and approved changes, among other financial information can help you understanding the financial state of the commitment at a glance.

Commitment Items Tab

This tab lists all the commitment items linked to this commitment. The following clickable links enable you to access related pages for further information or to take related action:

- Click the commitment item number to open the Edit Commitment Item page.
- Click the budget line item description to open the Line Item Details page.
- Click the funding rule link to open the Funding Source Distribution dialog and view the distribution percentages for this commitment.

Commitment Changes Tab

This tab lists all commitment changes for this commitment. From here you are able to mail merge the commitment change, export the information to a spreadsheet or add a change. Change details are provided on this table as described below:

- **Commitment Change Number:** Click this link to open the Commitment Change Details page for further information about the change.
- **Description:** This field displays the description of the change.
- **Reason For Change:** This field displays the reason code. Reason codes are entered into e-Builder by your account administrator, for more information, see Reason Codes.
- **Applies To:** This field displays whether the change was applied to the approved changes or to the original commitment amount. This setting is linked to the reason code and determined by the account administrator at the time of adding reason codes.

If the change applies to the Original Amount, the amounts will not be reflected as changes on the project; instead they will affect the original commitment number only. If set to Approved Changes, the amount will be reflected as a change to the commitment on the project.

- **Status:** This field displays the status of the change.
- **Date of Change:** This field displays the date of the change as specified by the user; not to be confused with the date the change was created.
- **Change Amount:** This field displays the amount that the commitment was changed by.

Actual Costs Tab

This tab displays for approved commitments only and lists all invoice items that have been applied against this commitment. From here you are able to mail merge the invoices, export the information to a spreadsheet or add an invoice. Invoice details are provided on this table as described below:

- **Invoice Number:** Click this link to open the Invoice Details page for further information about the invoice.
- **Description:** This field displays the description of the invoice.
- **Date Received:** This field displays the date that the invoice was entered in e-Builder.
- **Status:** This field displays the status of the invoice.
- **Invoice Amount:** This field displays the invoice amount.

Custom Fields Tab

This tab displays any commitment custom fields that have been created for the account. For more information on commitment custom fields, see Cost Custom Fields.

Notes Tab

This tab displays all existing notes and also allows you to add notes to the commitment.

Documents Tab

This tab displays all attached documents and also allows you to add or remove documents attached to the commitment.

Forms Tab

This tab displays all attached forms and also allows you to fill out a form; and add or remove forms attached to the commitment.

Processes Tab

This tab displays all attached processes and also allows you to add or remove processes attached to the commitment.

Add/ Edit Commitment Page

This page allows you to add or edit commitments. A detailed description of the fields and buttons located on this page is provided below:

Commitment Overview

- **Project:** Displays the project name by default.
- **Commitment Type:** Click to select a commitment type.
- **Commitment Number:** If the auto-fill feature is enabled in cost controls the commitment number displays by default; otherwise, you must enter a commitment number in this field.
- **Commitment Control:** Displays the commitment cost control. This field will be editable only if the Allow this setting to be changed on individual commitments check box is selected in the cost settings for the account. For information, see Cost Control Settings.
- **Unit Cost Options:** Displays the measure by which the commitment's cost will be calculated. Click to select between a Lump Sum Amount and Quantity/ Unit Cost.
- **Description:** Displays the description of the commitment.
- **Created:** (Edit Mode) Displays the date the commitment was created.
- **Status:** Displays the status of the commitment.
- **Company:** Displays the name of the company the commitment was made with. Click to select from a list of companies.
- **Company Number:** Displays the company number and will auto-fill when the company name is selected in the field above it.
- **Commitment Control Tolerance:** This field appears only if a commitment control tolerance is allowed. See Cost Settings for more information. A tolerance is a percentage above the commitment that can be paid out before commitment controls are violated. However, commitments and invoices will not be approved if they exceed the budget tolerance.

Note: If the commitment control tolerance setting is disabled on the account after a tolerance amount is entered and saved, the tolerance will still be honored when the commitment is approved.

Other Details

- **Commitment Date:** Displays the date the commitment is due as entered by the user. Click the calendar icon to select a date from the calendar.
- **Notice to Proceed Date:** Displays the date to start work on the item. Click the calendar icon to select a date from the calendar.
- **Scope of Work:** Enter the scope of work in this field.
- **Default Retainage Percent:** Enter the default percent that should be retained for this commitment.
- **Retainage amount:** Select the **Support manual entry** check box in this field to allow manual overriding of retainage amounts on invoice line items. This setting can be turned on or off at any time.

Note: Only users with add or edit commitment permissions can access the Add or Edit Commitment page to enable manual retainage entry.

Add New or Edit Commitment Item

- **Manage Funding:** Click this button to use the funding distribution tool to automatically or manually distribute funds from funding sources/ categories to selected line items. For more information, see Funding Distribution.
- **Update Retainage %:** Users with Add/ Edit Commitments permissions can update the Retainage % on all or multiple selected commitment items in bulk. This will eliminate the need to manually edit the Retainage % for each individual item. Select the commitment items that need a retainage update and then click the Update Retainage % button. The Update Retainage Percent window will be displayed with the following options:
 - **Update Retainage to:** Enter the updated retainage percent amount in this field.
 - **Also apply to Default Retainage Percent:** Select this check box to simultaneously update the Default Retainage % for future or new SOV items.
 - **Yes, update retainage:** Click this button to confirm the retainage update.
- **Item Number:** Although editable, this column auto-populates commitment item numbers sequentially as additional items are added.
- **Budget Line Item: Please Select A Line Item:** Click this link to open the **Budget Line Items** dialog box and click an account code number to make a selection to link the commitment item to.
- **Current Budget:** This is the approved original budget and all approved budget changes.
- **Description:** Although editable, this column auto-populates with the budget line item description once selected.
- **Funding Rule:** Click this drop-down arrow to select a funding rule for the commitment item. Click the Edit link to customize funding source distributions.

Note:

- **(Draft Commitments)** Although you can save items without a funding rule selected, you are not able to action the item (request approval or approve) until a funding rule is entered.

- **(Approved Commitments)** You are not able to save a commitment item on an approved commitment until a funding rule is entered.
- **Retainage Percent:** This field auto-populates with the default retainage percent, but can be edited. When an invoice is processed for this commitment item, the retainage percent in this field (commitment items) takes precedence over the default retainage percent entered for the commitment.
- **Amount:** Enter the amount of the commitment item in this field.

Note: (Approved Commitments) You are not able to add amounts for approved commitments; a commitment change is needed to add additional commitment item amounts to an approved commitment. You are however able to save new items to the commitment, because when you add a commitment change, the newly added commitment item will display in the list of existing commitment items for you to choose from.

- **Allowance Item?:** (Add Mode) Select this check box to flag the commitment as an allowance item. An allowance refers to money set aside for a specific purpose (commitment). You cannot invoice against these types of commitments. The disbursement of an allowance has to be done through a commitment change and applied to an existing or new commitment item.
- **Custom Field(s):** Click to fill in custom fields.
- **Equipment Item(s):** Click to add equipment items to this commitment. To learn more, see About Equipment Items.
- **Add:** Click to add the new commitment item.

Add/ Edit Master Commitment Page

To access the Add Master Commitment page

1. From the top navigation tabs, click the **Cost** tab.
2. On the Cost page, click the **Master Commitments** tab.
3. Click **Add Master Commitment**.

To access the Edit Master Commitment page

1. From the top navigation tabs, click the **Cost** tab.
2. On the Cost page, click the **Master Commitments** tab.
3. Click on the Master Commitment

This page allows you to add or edit commitments. A detailed description of the fields and buttons located on this page is provided below.

Master Commitment Overview

- **Master Commitment Type:** Click to select a commitment type.
- **Master Commitment Number:** If the auto-fill feature is enabled in cost controls the commitment number displays by default; otherwise, you must enter a commitment number in this field.
- **Unit Cost Options:** Displays the measure by which the commitment's cost will be calculated. Click to select between a Lump Sum Amount and Quantity/ Unit Cost.

- **Description:** Displays the description of the commitment.
- **Master Commitment Control:** Displays the commitment cost control. This field will be editable only if the Allow this setting to be changed on individual commitments check box is selected in the cost settings for the account. For information, see Account Cost Control Settings.
- **Created:** (Edit Mode) Displays the date the commitment was created.
- **Status:** Displays the status of the commitment.
- **Company:** Displays the name of the company the commitment was made with. Click to select from a list of companies.
- **Company Number:** Displays the company number and will auto-fill when the company name is selected in the field above it.
- **Commitment Control Tolerance:** This field appears only if a commitment control tolerance is allowed. See Cost Settings for more information. A tolerance is a percentage above the commitment that can be paid out before commitment controls are violated. However, commitments and invoices will not be approved if they exceed the budget tolerance.

Note: If the commitment control tolerance setting is disabled on the account after a tolerance amount is entered and saved, the tolerance will still be honored when the commitment is approved.

Other Details

- **Master Commitment Date:** Displays the date the commitment is due as entered by the user. Click the calendar icon to select a date from the calendar.
- **Notice to Proceed Date:** Displays the date to start work on the item. Click the calendar icon to select a date from the calendar.
- **Scope of Work:** Enter the scope of work in this field.
- **Default Retainage Percent:** Enter the default percent that should be retained for this commitment.

Add New Master Commitment Item

- **Manage Funding:** Click to use the funding distribution tool to automatically or manually distribute funds from funding sources/ categories to selected line items. For more information, see Funding Distribution.
- **Item Number:** Although editable, this column auto-populates commitment item numbers sequentially as additional items are added.
- **Budget Line Item:** Click the **Please Select A Line Item** link to open the **Budget Line Items** dialog box and click an account code number to make a selection to link the commitment item to.
- **Current Budget:** This is the approved original budget and all approved budget changes.
- **Description:** Although editable, this column auto-populates with the budget line item description once selected.
- **Funding Rule:** Click this drop-down arrow to select a funding rule for the commitment item. Click the Edit link to customize funding source distributions.

Note:

- **(Draft Commitments)** Although you can save items without a funding rule selected, you are not able to action the item (request approval or approve) until a funding rule is entered.
 - **(Approved Commitments)** You are not able to save a commitment item on an approved commitment until a funding rule is entered.
- **Retainage Percent:** This field auto-populates with the default retainage percent, but can be edited. When an invoice is processed for this commitment item, the retainage percent in this field (commitment items) takes precedence over the default retainage percent entered for the commitment.
 - **Amount:** Enter the amount of the commitment item in this field.

Note: (Approved Commitments) You are not able to add amounts for approved commitments; a commitment change is needed to add additional commitment item amounts to an approved commitment. You are however able to save new items to the commitment, because when you add a commitment change, the newly added commitment item will display in the list of existing commitment items for you to choose from.

- **Allowance Item?:** (Add Mode) Select this check box to flag the commitment as an allowance item. An allowance refers to money set aside for a specific purpose (commitment). You cannot invoice against these types of commitments. The disbursement of an allowance has to be done through a commitment change and applied to an existing or new commitment item.
- **Custom Field(s):** Click to fill in custom fields.
- **Equipment Item(s):** Click to add equipment items to this commitment. To learn more, see About Equipment Items.
- **Add:** Click to add the new commitment item.

Add/ Edit Commitment Item Page

This page allows you to add commitment items and make changes to existing item. It can also be used to see additional information about a change item. Below is a description of the fields and buttons located on this page.

Fields and Buttons

The fields and buttons located on this page are:

- **Save:** Click to save changes.
- **Cancel:** Click to cancel any edits you've made. All unsaved changes will be lost.
- **Project Name:** This field displays the project name by default.
- **Allowance Item:** If this commitment item was flagged as an allowance when entered, this check box will be selected. An allowance refers to money set aside for a specific purpose (commitment). You cannot invoice against these types of commitments. The dispersal of an allowance has to be done through a commitment change to an existing or new commitment item.
- **Commitment Item Number:** This is the number of the commitment item.
- **Budget Line Item:** This is the budget line item this commitment item is associated with.

- **Description:** This is the budget line item description.
- **Retainage Percent:** This is the retainage percent amount.
- **Amount Retained:** This is the total amount being retained.
- **Funding Rule:** This is the funding rule associated with the commitment item. Click the drop-down arrow to make a selection or click the Edit link to customize a funding rule to apply to this commitment item.
- **Commitment Number:** This is the commitment number.
- **Current Budget:** This is the approved original budget and all approved budget changes.
- **Remaining To Be Committed:** This is the amount left to be committed from the associated budget line item.
- **Amount:** This is the amount of the commitment item.
- **Retainage Released:** This is the amount that is approved to be released. For more information, see About Retainage Release in e-Builder.
- **Current Retainage Held:** This is the amount of retainage currently held (not yet paid).

Commitment Item Details Page

This page allows you to see the details of a commitment item.

Fields and Buttons

The fields and buttons on this page are:

- **Close:** Click to close this page and return to the Commitment Details page.
- **Project Name:** This field displays the project name by default.
- **Allowance Item:** If this commitment item was flagged as an allowance when entered, this check box will be selected. An allowance refers to money set aside for a specific purpose (commitment). You cannot invoice against these types of commitments. The dispersal of an allowance has to be done through a commitment change to an existing or new commitment item.
- **Commitment Item Number:** This is the number of the commitment item.
- **Budget Line Item:** This is the budget line item this commitment item is associated with.
- **Description:** This is the budget line item description.
- **Retainage Percentage:** This is the retainage percent amount.
- **Amount Retained:** This is the total amount being retained.
- **Funding Rule:** This is the funding rule associated with the commitment item. Click the drop-down arrow to make a selection or click the Edit link to customize a funding rule to apply to this commitment item.
- **Project Number:** If applicable, the project number displays in this field.
- **Commitment Number:** This is the commitment number.
- **Current Budget:** This is the approved original budget and all approved budget changes.
- **Remaining To Be Committed:** This is the amount left to be committed from the associated budget line item.

- **Amount:** This is the amount of the commitment item.
- **Retainage Released:** This is the amount that is approved to be released. For more information, see About Retainage Release in e-Builder.
- **Current Retainage Held:** This is the amount of retainage currently held (not yet paid).
- **Commitment Changes Tab:** This tab lists all commitment changes for this commitment. From here you are able to mail merge the commitment change, export the information to a spreadsheet or add a change. Change details are provided on this table as described below:
 - **Commitment Change Number:** Click this link to open the Commitment Change Details page for further information about the change.
 - **Description:** This field displays the description of the change.
 - **Reason For Change:** This field displays the reason code. Reason codes are entered into e-Builder by your account administrator, for more information, see Reason Codes.
 - **Applies To:** This field displays whether the change was applied to the approved changes or to the original commitment amount. This setting is linked to the reason code and determined by the account administrator at the time of adding reason codes.
 - If the change applies to the Original Amount, the amounts will not be reflected as changes on the project; instead they will affect the original commitment number only. If set to Approved Changes, the amount will be reflected as a change to the commitment on the project.
 - **Status:** This field displays the status of the change.
 - **Date of Change:** This field displays the date of the change as specified by the user; not to be confused with the date the change was created.
 - **Change Amount:** This field displays the amount that the commitment was changed by.
- **Actual Costs Tab:** This tab displays for approved commitments only and lists all invoice items that have been applied against this commitment. From here you are able to mail merge the invoices, export the information to a spreadsheet or add an invoice. Invoice details are provided on this table as described below:
 - **Invoice Number:** Click this link to open the Invoice Details page for further information about the invoice.
 - **Description:** This field displays the description of the invoice.
 - **Date Received:** This field displays the date that the invoice was entered in e-Builder.
 - **Status:** This field displays the status of the invoice.
 - **Invoice Amount:** This field displays the invoice amount.
- **Custom Fields Tab:** This tab displays any commitment custom fields that have been created for the account. For more information on commitment custom fields, see Cost Custom Fields.

Add/ Edit Change Details Page

This page allows you to add/edit commitment changes.

Fields and Buttons

The fields and buttons located on this page are:

- **Save and Add All Line Items:** Click to save changes and apply this commitment change to all commitment items.
- **Save and Add Items One at a Time:** Click to save changes and apply this commitment change to specific commitment items.
- **Save:** Displays in Edit mode. Click to save changes.
- **Cancel:** Click to cancel commitment change modifications and return to the Commitment Details page. All unsaved changes will be lost.
- **Project Name:** Displays the project name by default.
- **Commitment:** Displays the name of the commitment.
- **Commitment Change Number:** If the auto-fill feature is enabled in cost controls the commitment number displays by default; otherwise, you must enter a budget change number in this field.
- **Status:** Displays the status of the budget change.
- **Date of Change:** If you are adding a new commitment change, the present date displays by default; click the calendar icon to choose a different date. When editing the commitment change, the date of change displays, but can also be modified.
- **Reason Code:** Click to select a commitment change reason code. These codes are configured by account administrators; see Working with Change Reason Codes.
 - **(Changes):** When applied, the change amount is applied to the current commitment amount, which includes all approved changes. This amount will be reflected in the Current Commitment column.
 - **(Original):** If this code is applied, the change will apply to the original commitment amount, which does not include any approved changes. This change amount will be reflected in the Original Commitment'
- **Description:** Enter a description for the budget change in this field.
- **Custom Fields:** If budget change custom fields are available for your account, they display here. Custom fields are entered by the account administrator; for more information, see Cost Custom Fields.

Add/ Edit Master Commitment Change Page

This page allows you to add/edit commitment changes.

Toolbar Buttons

- **Save and Add All Line Items:** Click to save changes and apply this commitment change to all commitment items.
- **Save and Add Items One at a Time:** Click to save changes and apply this commitment change to specific commitment items.
- **Cancel:** Click to cancel commitment change modifications and return to the Commitment Details page. All unsaved changes will be lost.
- **Save:** Click to save changes. This button is displayed only in the edit mode.

Master Commitment Change Overview

- **Master Commitment:** Select the name of the master commitment.
- **Master Commitment Change Number:** If the auto-fill feature is enabled in cost controls, the commitment number displays by default; otherwise, you must enter a budget change number in this field.
- **Date of Change:** If you are adding a new commitment change, the present date displays by default; click the calendar icon to choose a different date. When editing the commitment change, the date of change displays, but can also be modified.
- **Description:** Enter a description for the budget change in this field.
- **Company:** The name of the company is populated by default once a master commitment is selected.
- **Status:** Displays the status of the budget change.
- **Reason Code:** Click to select a commitment change reason code. These codes are configured by account administrators; see Working with Change Reason Codes.
 - **(Changes):** When applied, the change amount is applied to the current commitment amount, which includes all approved changes. This amount will be reflected in the Current Commitment column.
 - **(Original):** If this code is applied, the change will apply to the original commitment amount, which does not include any approved changes. This change amount will be reflected in the Original Commitment.

Custom Fields

If budget change custom fields are available for your account, they are displayed here. Custom fields are entered by the account administrator; for more information, see Cost Custom Fields.

Add/ Edit Commitment Change Item Page

Fields and Buttons

The fields and buttons located on this page are:

- **Save & Add New:** Click to save the change item and add another.
- **Save:** Click to save the change item.
- **Cancel:** Click to cancel any changes you may have made. All unsaved changes will be lost.
- **Project Name:** This field displays the project name by default.
- **Commitment Change Item Number:** If the auto-fill feature is enabled in cost controls the change item number displays by default; otherwise, you must enter a commitment change number in this field.
- **Description:** Enter a description for the commitment change item in this field.
- **Please choose:**
 - **Select Existing Commitment Item:** Select this radio button to add this change item to an existing commitment. Click the drop-down arrow to make a selection.
 - **Create New Commitment Item:** Select this radio button to add this change item to a new commitment. Click the drop-down arrow to make a selection. This function gives you the opportunity

to create a new commitment item. Upon saving, the additional item is added to both the commitment change and to its associated commitment.

When creating a new commitment item, these additional fields display; a description of each is below:

- Retainage Percent
 - Funding Rule
 - Current Budget
 - Remaining to be Committed
- **Retainage Percent:** This field only displays if you choose to create a new commitment item. The percent defaults to the retainage percent of the commitment, but you can edit it if you choose.
 - **Funding Rule:** If funding is enabled on the budget level, this field displays only after the associated budget line item is selected. This field defaults to the funding rule selected for the budget line item. Click the drop-down arrow to choose a different funding rule, or click the Edit link to customize a funding rule.
 - **Change Amount:** Enter the commitment change amount in this field.
 - **Current Budget:** This field only displays if you choose to create a new commitment item. The current budget is the approved original budget and all approved budget changes.
 - **Remaining to be Committed:** This field only displays if you choose to create a new commitment item. This is the amount that is left to be committed. Use this amount to determine how much are available to support the change amount.
 - **Project Number:** If available, the project number displays in this field.
 - **Commitment Change Number:** If the auto-fill feature is enabled in cost controls, the budget number displays by default; otherwise, you must enter a budget change number in this field.
 - **Current Commitment Amount:** When an existing commitment is selected, its commitment amount displays in this field.

Commitment Change Details Page

This page allows you to view the details of a commitment and to take action on a commitment change. The Quick Cost Summary gives you a snapshot of the budget details so you can gauge how the project is progressing in terms of funding; your commitments, actuals, overages, funding balance, etc. A detailed description of the fields and buttons located on this page is provided below.

To access the Commitment Change Details page

1. Go to the Cost Summary page.
2. Click the **Commitments** link located in the left navigation bar.
3. On the Commitment page, click the commitment number or description of the commitment.
4. On the Commitment Details page, click the **Commitment Changes** tab.
5. Click the commitment change number link to view the change details.

Toolbar Buttons

- **Mail Merge:** Click to open a mail merge document. In e-Builder, a mail merge document is a Microsoft Word® or PDF® print out of the data currently in view. Mail merge templates can be

generic, providing just the data currently in view, or custom. If a template has not been created for your project, a generic printout opens. Custom templates provide additional cost data. These templates are created by your e-Builder Administrator and can be tailored with field mappings to capture very specific cost information. For more information, see [Mail Merge Template](#).

- **Make Pending:** Click to mark the commitment as pending. In a process, the status might automatically be set once the process enters a specific step. The pending status is usually used to refer to commitments that are pending a hard signature.
- **Edit:** Click to edit the details of the commitment change.
- **Make Projected:** Click to mark the commitment as projected. In a process, the status might automatically be set once the process enters a specific step. The projected status is used to account for anticipated commitments that you want to start accounting for.
- **Request Approval:** Click to request a commitment approval. Only users with Approve Commit Changes permissions. For more information, see [Manage Permissions](#).
- **Approve:** Displays for users with Approve Final Commit permissions. Click to approve a commitment.
- **Delete:** Click to delete the commitment change.

Commitment Change Details

- **Project:** This field displays the project name. Click this link to open the Commitment Details page.
- **Commitment:** Click this link to open the Commitment Details page.
- **Change Number:** This is the commitment change number used to identify the change.
- **Reason For Change:** This field displays the reason code. Reason codes are entered into e-Builder by your account administrator, for more information, see [Reason Codes](#).
- **Applies To:** This field displays whether the change was applied to the approved changes or to the original commitment amount. This setting is linked to the reason code and determined by the account administrator at the time of adding reason codes. If the change applies to the Original Amount, the amounts will not be reflected as changes on the project; instead they will affect the original commitment only. If set to Approved Changes, the amount will be reflected as a change to the commitment on the project.
- **Description:** This is the description of the commitment change.
- **Project Number:** If applicable, this field displays the project number.
- **Status:** This is the status of the commitment change.
- **Company:** This is the name of the company the commitment was made with.
- **Date of Change:** This is the date that the change was created.
- **Created:** This is the date that the commitment change was created. The name of the user who created it is in parentheses.
- **Controlling Process:** This field displays if a cost process exists for the commitment change. If the process is not yet completed (not in the approve or void status) it can only be updated in the process and not in the Cost module; in which case the action buttons (Make Pending, Make Projected, Edit, etc.) will not display.

- **Adjustment Amount:** This field displays the absolute value of a net zero change. This amount can be pulled into reports and also added to a conditional branch process step.

Quick Cost Summary

The Quick Cost Summary section offers a more condensed, yet comprehensive view of the budget, providing current status of the original budget, current commitments and invoices paid to date.

- **Current Budget:** This is the approved original budget and all approved budget changes.
- **Current Commitments:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows: (approved commitment changes) + (original commitments) + (approved general invoices).
- **Actuals Approved:** This is the amount of all approved invoices.
- **Actual Cost to Complete:** This is the total invoice amount needed to fulfill all commitments. The formula is as follows: (projected commitments) (actuals approved).
- **Available Funds:** This is the total amount of funds available in your funding sources.

Note: Funds are not depleted from the funding source until invoices have been approved. This total does not take into account invoices marked received.

- **Forecasted Over/ (Under):** This figure represents an amount above or under the forecasted budget. This total is the difference between the estimate at completion and the current budget. The formula is as follows: (estimate at completion) (current budget). For more information on the forecasting utility, see Forecasting.

Commitment Change Items Tab

From this tab can add commitment change items, view funding distribution percentages and details of the commitment change items.

- **View Funding:** Click to open the Funding Distribution dialog box and view funding distributions across funding sources/ categories. Click **Edit** and then **Manage Funding** to use the funding distribution tool to automatically or manually distribute funds from funding sources/ categories to evenly. For more information, see Funding Distribution.
- **Add All Line Items:** Click to add all commitment items to the commitment change.
- **Add Item:** Click to add a new item to the commitment change. You will be able to add the item to an existing commitment item or create a new commitment item to add the commitment change to.

Custom Fields Tab

This tab displays any commitment change custom fields. For more information on commitment custom fields, see Cost Custom Fields.

Notes Tab

This tab displays notes that have been added to the commitment change. From here you can also add notes to the commitment change.

Documents Tab

This tab displays files that have been attached to the commitment change. From here you can also attach or remove documents from the commitment change.

Forms Tab

This tab displays forms that have been attached to the invoice. From here you can also attach or remove documents from the commitment change.

Processes Tab

This tab displays processes that have been attached to the invoice. From here you can also attach or remove processes from the commitment change.

Import Commitments Page

Note: Depending on your account settings this page may or may not be available to you. The Cost import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager.

You are taken through a three step wizard when importing commitments. A description of the fields and buttons on each step is below.

Note: For detailed steps see Import Commitments.

Step 1 of 3:

- **Project Identifier:** Select a Project Identifier. This is a unique ID that will identify which project the budget import is for, examples include project name and project number. Project identifiers are entered into e-Builder as required project custom fields. For multiple options to display, the **Do not allow duplicates** check box must be selected on the Edit Custom Fields page.
- **Browse...:** Click to select the import file.

Step 2 of 3: Field Mappings

Use this section to map the fields in your spreadsheet to the default commitment built-in fields in e-Builder. For each required and optional built-in field, click the drop-down arrow and select the corresponding field in the spreadsheet. If the column names in your spreadsheet are identical to the built-in fields, they will populate automatically.

- **Previous:** Click to return to the previous page.
- **Next:** Click to go to the next step of the import process after all fields have been completed.
- **Cancel:** Click to cancel the import process and return to the Data Entry page.

Step 3 of 3: Review

The Preview tab displays by default and allows you to review the details of the import; whether it was successful or not. If there were errors, details display on the Exceptions tab.

- **Exceptions Tab:** Lists all errors, if any. Click the Export Exceptions button to export details to a spreadsheet.
- **Warnings Tab:** Lists all warning messages, if any.

Import Commitment Changes Page

Note: Depending on your account settings this page may or may not be available to you. The Cost import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager.

You are taken through a three step wizard when importing commitment changes. A description of each page is below.

Note: For detailed steps, see Import Commitment Changes.

Step 1 of 3

- **Project Identifier:** Select a Project Identifier. This is a unique ID that will identify which project the budget import is for, examples include project name and project number. Project identifiers are entered into e-Builder as required project custom fields. For multiple options to display, the **Do not allow duplicates** check box must be selected on the Edit Custom Fields page.
- **Browse...:** Click to select the import file.

Note: You are also able to include additional scope items to the commitment change import.

Step 2 of 3: Field Mappings

Use this section to map the fields in your spreadsheet to the default commitment change built-in fields in e-Builder. For each required and optional built-in field, click the drop-down arrow and select the corresponding field in the spreadsheet. If the column names in your spreadsheet are identical to the built-in fields, they will populate automatically.

- **Previous:** Click to return to the previous page.
- **Next:** Click to go to the next step of the import process after all fields have been completed.
- **Cancel:** Click to cancel the import process and return to the Data Entry page.

Step 3 of 3: Review

The Preview tab displays by default and allows you to review the details of the import; whether it was successful or not. If there were errors, details display on the Exceptions tab.

- **Exceptions Tab:** Lists all errors, if any. Click the Export Exceptions button to export details to a spreadsheet.
- **Warnings Tab:** Lists all warning messages, if any.

Actual Costs

Actual Costs are invoices paid to any party for goods or services on a project. Two types of invoices can be entered in e-Builder, general invoices and commitment invoices. Actuals that are not associated with a commitment (building permits, journal entries, etc.) are called general invoices. Actuals that are paid against a particular Commitment (Contract) are commitment invoices. Tracking Actuals in e-Builder will allow you to know what has been paid and what is outstanding. Tracking actuals also helps with projecting cash flow.

Tip

Many of the procedures related to invoices can be performed by way of an automated cost process. See [About Cost Processes](#) for more information.

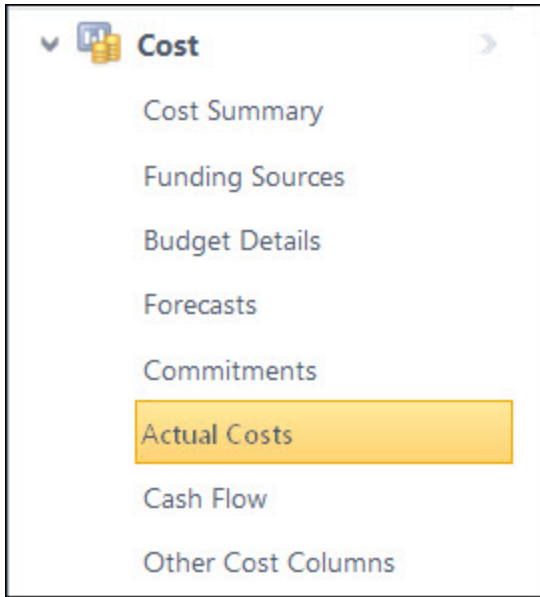
The following topics will help you work with invoices:

- [About the Payment Application](#)
- [About Retainage Release in e-Builder](#)
- [Process Retainage Release](#)
- [Add Commitment Invoices](#)
- [Add General Invoices](#)
- [Edit Invoice Details](#)
- [Request Invoice Approval](#)
- [Approve Invoices](#)
- [Mark Invoice Received](#)
- [Mark Invoice Paid](#)
- [Delete Invoices](#)
- [Void Invoices](#)
- [Add Notes to Invoices](#)
- [Attach Documents to Invoices](#)
- [Attach Forms to Invoices](#)
- [Attach Processes to Invoices](#)
- [Mail Merge Invoices](#)
- [Export Invoices to Spreadsheet](#)
- [Actual Cost Page Overview](#)

[Access the Invoice Details Page](#)

[To access the Invoice Details page](#)

1. Go to the [Cost Summary](#) page.
For more information, see [Access the Project Cost Summary Page](#).
2. Click the **Actual Costs** link located in the left navigation bar.



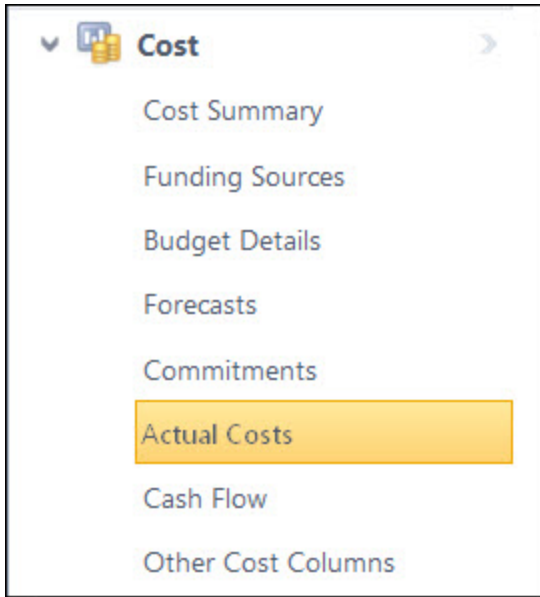
3. Click the invoice number of the desired invoice.
The Invoice Details page is displayed.

Access Actual Costs Page

To access the Actual Costs page

1. Go to the Cost Summary page.
For more information, see [Access the Project Cost Summary Page](#).
2. Click the **Actual Costs** link located in the left navigation bar.

The Actual Costs page is displayed.



About the Payment Application


e-Builder's application for payment feature supports widely used standards for processing invoices. By flagging commitment types to use the payment application functionality, pay app specific columns become available while processing an application for payment (commitment invoice) throughout the Cost and Processes modules. The Application for Payment feature is a fit for clients who already use or want to start using industry standard invoice processing. Additionally, you might choose to enable the payment application to take advantage of the schedule of values download and import capabilities.

Invoice Items										Download Schedule of Values Worksheet.xls		Import Invoice Items		Manage Funding	
A	B	C		D	E	F	G	H	I	J	K				
Commitment Item #	Description of Work	Budget Code with Description	Funding Rule	Scheduled Value	Work in Place From Previous Application(s)	This Period	Total Materials Presently Stored	Current Payment Due This Period	Total Completed and Stored To Date (D + E + F)	% (G / I)	Balance to Finish (C - G)	Retainage Release Amount	Retained This Period	Amount Less Retainage	Cumulative Retainage
001	Legal / SEA Fees	04 - Legal / SEA Fees	Atlanta Legis	500.00	0.00	0.00	0.00	0.00	0.00	0.00%	500.00	0.00	0.00	0.00	550.00
Total				500.00	0.00	0.00	0.00	0.00	0.00	0.00%	500.00	0.00	0.00	0.00	550.00

Payment Application - Columns

The columns on the payment application are:

- **A - Commitment Item #:** Displays the commitment number.
- **B - Description of Work:** Displays the description of work for the respective commitment line item.
- **Budget Code with Description:** Displays the budget code and description of the budget line item that the commitment is associated with.
- **Funding Rule:** Displays the funding rule used for the commitment invoice. Click the drop-down arrow to make a selection if an option is not populated. Action cannot be taken on a commitment invoice (Request Approval, Approve, Mark as Paid etc.) if a funding rule is not selected.
- **C - Scheduled Value:** Displays the amount of the commitment item.
- **D - Work in Place from Previous Application(s):** Displays the total approved invoice amount from previous payment applications for work in place excluding any previously stored material.

- **E - This Period:** Displays the amount of work in place for this period.
- **F - Total Materials Presently Stored:** Displays the net materials store, which is the materials stored from previous payment applications and newly delivered items awaiting payment for this period.
- **G - Total Completed and Stored to Date (D+E+F):** Displays the amount of work completed and stored to date, which is the sum of work in place from previous payment applications, the amount of work in place for this period and the total amount of material stored to date, including newly delivered items awaiting payment.
- **H - % (G/C):** Displays the total amount of materials completed and stored divided by the commitment amount.
- **I - Balance to Finish (C-G):** Displays the remaining balance.
- **J - Retainage Release Amount:** Displays the amount of remaining retainage.
- **Retained This Period:** Displays the invoice amount retained for this period
- **Amount Less Retainage:** Displays the net invoice amount due for payment for this period
- **K - Cumulative Retainage:** Displays the cumulative retainage amount for all previous payment applications.
- **Edit Invoice Custom Fields Icon** (): Click this icon to add or modify invoice item custom fields.

Tip: This icon is located at the far right of the Invoice Items table, scroll to the end of the table to located this button.

About Retainage Release in e-Builder

In e-Builder, the process for releasing retainage will differ based on the type of commitment the invoice is processed against. For payment application-type commitments, a Retainage Release Amount field is available on the Add/Edit Commitment Invoice Page that allows you to pay retainage while also processing the invoice. On the contrary, invoices being processed for commitments that are not payment application-type commitments require you to do a separate commitment invoice to release retainage.

Note:

- Action cannot be taken on a commitment invoice (request approval, approve) if the retainage amount exceeds the retainage percent amount set for the commitment item/commitment.
- Commitment item percentages take precedence over default commitment percentages.

Related Topics:

- Process Retainage Release
- About the Payment Application
- Add Commitment Invoices
- Add/Edit Commitment Invoice Page Overview

Process Retainage Release

Unless the commitment being invoiced is a pay app commitment, you must process a separate invoice in order to pay the retainage.

To release retainage

1. Go to the Invoice Details page.
For more information, see [Access the Invoice Details page](#).
2. Click **Add Invoice**.
3. Click **Yes, Add a Commitment Invoice**.
4. Enter all required fields.
For more information of the fields and buttons located on this page, see [Add/Edit Commitment Invoice Page Overview](#).
5. If this invoice is for a pay app commitment, go to the next step.
—Or—
If the invoice is for a non pay app commitment, select the **This is a retainage release** check box.
6. In the **invoice Items** section, enter the amount to be paid for retainage in the **Retainage Release** field.
7. Click **Save** or **Save and Add New**.

Related Topics:

- [About Retainage Release in e-Builder](#)
- [About the Payment Application](#)

Import Invoices

Note: Depending on your account settings you may or may not be able to import invoices. The Cost import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager. Once the option is available, only users with Import permissions can perform this task.

To import invoices

1. Click the **Data Entry** link located in the Top Navigation Tabs.
The Data Entry Menu page is displayed.
2. Click **Import Invoices**.
The Import Invoices page (Step 1 of 3) displays.
3. Complete all required fields.
For detailed descriptions of the field and buttons located on this page, see [Import Invoices Page Overview](#).
4. Click **Next**.
Step 2 of 3 displays.
5. Complete all required fields.

6. Click **Next**.

Step 3 of 3 displays.

7. If the file was mapped correctly and there aren't any exceptions or warning, click **Import**.

—Or—

If there are exceptions, the Import button is disabled. Click the Exceptions tab to review the exceptions and make any necessary changes to the spreadsheet. Click **Previous** to reimport the file, and then repeat steps 5-7.

Update Invoice Payment Status via Import

Note: Depending on your account settings you may or may not be able to import invoice payment statuses. The Cost import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager. Once the option is available, only users with Import permissions can perform this task.

To update invoice payment statuses via import

1. Click the **Data Entry** link located in the Top Navigation Tabs.

The Data Entry Menu page displays.

2. Click **Update Invoice Payment Status**.

The Update Invoice Payment Status page (Step 1 of 3) displays.

3. Complete all required fields.

For detailed descriptions of the field and buttons located on this page, see Update Invoice Payment Status Page Overview.

4. Click **Next**.

Step 2 of 3 displays.

5. Complete all required fields.

6. Click **Next**.

Step 3 of 3 displays.

7. If the file was mapped correctly and there aren't any exceptions or warning, click **Import**.

—Or—

If there are exceptions, the Import button is disabled. Click the Exceptions tab to review the exceptions and make any necessary changes to the spreadsheet. Click **Previous** to reimport the file, and then repeat steps 5-7.

Add Commitment Invoices

A commitment invoice is an actual cost that is applied to an existing commitment to track how much of that commitment has been paid out to date or is still outstanding.

To add a commitment invoice

1. Go to the Invoice Details page.

For more information, see [Access the Invoice Details page](#).

2. Click **Add** and then select **Commitment Invoice**.

3. Enter all required fields.

For more information of the fields and buttons located on this page, see [Add/Edit Commitment Invoice Page Overview](#).

4. *Optional:* You can take the following action:

- Attach Documents to Invoice Line Items

5. Click **Save** or **Save and Add New**.

Add General Invoices

General invoices are not associated with commitments and may be issued for a subset of a budget line item, such as legal fees, builder permits etc., things that are required to be paid on the project, but not project-based contracts such as flooring, and other building material.

Note: The invoice can be saved with or without invoice items at this time. You have the flexibility to added items to the invoice at any time while it is in the Draft status. Once action is taken on the item (Approval Requested, Approved, Paid etc.) you are no longer able to add invoice line items. To add line items after this draft is saved, simply edit the invoice.

To add a general invoice

1. Go to the Invoice Details page.

For more information, see [Access the Invoice Details page](#).

2. In the Quick Cost Summary section, click **Add** and then select **General Invoice**.

3. Enter all required fields.

For more information on the fields and buttons located on this page, see [Add/Edit General Invoice Page Overview](#).

4. Optionally, you can add invoice items at this time (Steps 6 - 10).

—Or—

To add invoice items later, click **Save**.

To add invoice items now

1. Scroll down to the **Invoice Items** section, and then click **Please Select A Line Item**. The Budget Line Items dialog box displays.

2. Click the account code link of the budget line item you'd like to add. Your selection is populated in the **Invoice Items** section.

Note: The following step only applies if funding is enabled on your account; otherwise, go to step 4.

3. If a funding rule did not auto-populate or if you want to change the funding rule, click the **Funding Rule** drop-down arrow to select a funding rule or click the **Edit** link to enter a custom rule. Funding allocations must add up to 100%.

4. In the **Amount** column, enter the amount of the invoice item.
5. To add additional line items, click the **Add** link, and then repeat this procedure.
—Or—
Click **Save**.

Add Master Invoices

Depending on account configurations, master invoices can be added by a predefined process or in the standard manner, via the Cost module.

Note: Account Level Cost must be enabled for the account to access this feature. Only users with the Add/Edit Master Invoice permission can add master invoices.

Master invoices are used to submit billing invoices against master commitments. Master commitments are contracts that span more than one e-Builder project, so they are typically set up to handle a program manager, architectural/ engineering firm, or job order contractor engaged by an Owner to provide services on more than one project.

When preparing a master invoice, you can invoice against master commitment items that have been allocated to projects that you are a member of.

To add master invoices

1. Click **Cost** from the top navigation menu.
2. Click the **Master Invoices** tab.
3. Click **Add Master Invoice**.
If a process has been configured for you to submit master invoices, the process details page is displayed. If not, the Add Master Invoice page is displayed.
4. Complete all required fields.
5. Click **Save** or **Save and Add New**.

Edit Invoice Details

The details of an invoice can be changed before or after the invoice has been approved. Additional line items can be added as well, but only in the draft state.

To edit invoice details

1. Go to the Invoice Details page.
For more information, see [Access the Invoice Details Page](#).
2. Click **Edit**.
3. Make changes to any of the editable invoice details.
4. *Optional:* You can:
 - Add additional invoice items to draft invoices that do not have items attached to it.

- Attach Documents to Invoice Line Items
5. Click **Save**.

Request Invoice Approval

Once entered, invoices are saved as drafts. If you do not have approval permissions, you have to request an invoice approval.

Note: If funding sources have been added to the project, you will not be able to take action on an invoice (Mark Received, Request Approval etc.) if a funding rule has not been applied.

To request an invoice approval

1. Go to the Invoice Details page.
For more information, see [Access the Invoice Details Page](#).
2. Click **Request Approval**.
The approval is sent to users with Approve Final Actual permission for further action.

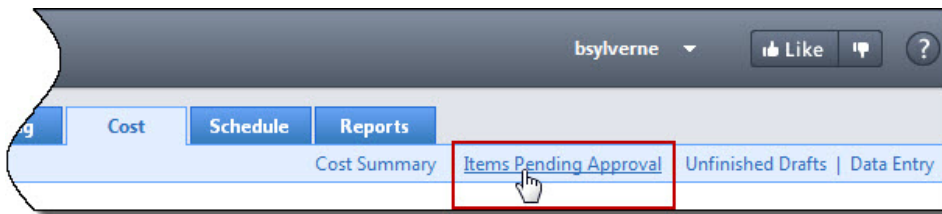
Approve Invoices

Invoices can only be approved by users with Approve Final Invoice permissions; for more information, see [Manage Permissions](#).

Note: Additional items cannot be added to an invoice once it is approved. Additionally, approved invoices cannot be deleted; it has to be voided to be removed from the budget.

Tip

- Invoice approvals can be done via a cost process called an Actual Cost Process.
- Click the Items Pending Approval link located toward the top of the page to view a list of all cost items that are pending your approval. This quick link can be accessed regularly to stay abreast of pending approvals throughout the Cost module. An Items Pending Approval section is also located on the Home tab for your convenience.



To approve an invoice

1. Go to the Invoice Details page.
For more information, see [Access the Invoice Details Page](#).
2. Click **Approve**.
You are prompted to enter an approval date and add a note.

3. Click the current date link to insert today's date into the field, or enter a different date in the **Approval Date** field.
4. Click **Yes, Approve Commitment**.
The newly added commitment is updated on the Project Cost Summary and Commitments Quick Cost Summary.

Related Topics:

- Edit Invoice Details
- Void Invoices
- Mark Invoice Received
- Mark Invoice Paid

Mark Invoice Received

Marking an invoice Received is a way to let team members know that the invoice has been received, entered in e-Builder and is ready to be approved, and then paid.

Note: If funding sources have been added on the project level, you will not be able to take action on an invoice (Mark Received, Request Approval etc.) if a funding rule has not been applied.

To mark an invoice received

1. Go to the Invoice Details Page.
For more information, see Access the Invoice Details Page.
2. Click **Mark Received**.

Mark Invoice Paid

Typically, an invoice is marked paid when the accounting department has issued a check to the vendor. Once an invoice has been marked paid, it cannot be deleted; to remove the paid invoice from the budget, you must void it.

Note: If funding sources have been added on the project level, you will not be able to take action on an invoice (Mark Received, Request Approval etc.) if a funding rule has not been applied.

To mark an invoice Paid

1. Go to the Invoice Details Page.
For more information, see Access the Invoice Details Page.
2. Click **Mark Paid**.
You are prompted for confirmation and to enter a date for the payment.
3. Click the current date link to insert today's date into the field, or enter a different date in the **Date Paid** field.
If this is a draft invoice, you are also required to enter an approval date.
4. Click **Yes, Mark as Paid**.

Delete Invoices

Only draft invoices can be deleted. If an invoice has already been approved and needs to be removed from the budget, it cannot be deleted, it has to be voided.

To delete an invoice

1. Go to the Invoice Details Page.
For more information, see [Access the Invoice Details Page](#).
2. Click **Delete**.
You are prompted for confirmation.
3. Click **Yes, Delete the Invoice**.

Void Invoices

Invoices that may have been approved in error can be voided in order to be removed from the project's budget. A voided invoice cannot be paid and the invoice amount will not be included in the actual totals.

You can also void invoices marked as paid. This is helpful, for example, for situations in which accounts payable short bills or cancels an invoice (for example, if they require that a new invoice be submitted). It is not necessary to offset a paid invoice by creating another invoice. With the right permissions, you can simply void paid invoices if necessary.

To void an invoice

1. Go to the Invoice Details Page.
For more information, see [Access the Invoice Details Page](#).
2. Click **Void**.
You are prompted for confirmation.
3. Click **Continue**.

Add Notes

The Notes tab allows users to quickly add notes of importance. Notes allow all team members who have the permission to see the communication. For each note entered, the first and last name and company name of the user will be displayed along with the date. Contained within the tab, in parenthesis, e-Builder displays the total number of notes created.

To add notes

1. On the **Notes** tab, click **Add**.
The Add Note page is displayed.
2. Enter the note in the **Note** field.
3. If the **Private** check box is available, you can select it to hide your note from other team members.
4. Click **Save**.

Attach Documents to Invoices

You have the ability to view, as well as attach any supporting documents associated with the invoice. Once attached, other users can view and download these files. You may choose to attach files in order to have a scanned/electronic version of an original invoice, readily accessible for review.

Tip

In IE10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise™.

To view/attach documents to an invoice

1. Go to the Invoice Details page.
For more information, see [Access the Invoice Details Page](#).
2. Click the **Documents** tab.
3. Click **Attach Documents**.
The Attach Documents dialog box displays.
4. In the **Select Attachment Method** section, select your method of attachment.
5. Click **Browse For Files...**
6. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
7. If you are attaching files from e-Builder, go to step 9.
—Or—
If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.
8. Search for and select the e-Builder destination folder.
9. Click **Attach Selected**.

Attach Forms to Invoices

You have the ability to attach and remove attached forms from an invoice.

To attach forms to an invoice

1. Go to the Invoice Details page.
For more information, see [Access the Invoice Details Page](#).
2. Click the **Attached Forms** tab.
3. Click **Attached Forms**.
The Attach Forms from [Project Name] filter displays.
4. Filter for the forms you want to see.
Results display in the table below.

5. Select the check box next to the form(s) you want to attach.
6. Click **Attach**.

Attach Processes to Invoices

To attach processes to a commitment change

1. Go to the Invoice Details page.
For more information, see [Access the Invoice Details Page](#).
2. Click the **Processes** tab.
3. Click **Attach Processes**.
The Attach Processes from [Project Name] filter displays.
4. Filter for the processes you want to see.
Results display in the table below.
5. Select the check box next to the process(es) you want to attach.
6. Click **Attach**.

Mail Merge Invoices

Information about an invoice can be printed to a custom template created by the account administrator. Mail Merge is primarily used to obtain hard copy signatures. Mail merge templates may be in Microsoft Word® or Adobe PDF® formats, as configured by your e-Builder admin. For more information on cost mail merge templates including customizations, see [Cost Templates](#). To export invoices to a spreadsheet, see [Export Invoices to Spreadsheet](#).

To generate an invoice mail merge

1. Go to the Invoice Details page.
For more information see [Access the Invoice Details Page](#).
2. Click **Mail Merge**.
The Select Mail Merge Template displays.
3. If only one template displays for you to choose from, go to the next step. If there are multiple templates available, make a selection.
4. Click **Continue**.

Attach Documents to Invoice Line Items

Attaching documents to invoice line items allows you to append additional resources for each item in an invoice.

Tip

In IE10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise™.

To attach documents to invoice line items

1. To add documents to existing invoices, go to the Invoice Details page.
For instructions, see [Access Invoice Details Page](#).
2. Click **Edit**.
The Edit Invoice page is displayed.
3. Click the paper clip icon next to the invoice line item you want to attach files to.
The Attach Documents pop-up window displays.
4. Click **Add**.
The Attach Documents dialog box displays.
5. In the **Select Attachment Method** section, select your method of attachment.
6. Click **Browse For Files...**
7. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
8. If you are attaching files from e-Builder, go to step 10.
—Or—
If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.
9. Search for and select the e-Builder destination folder.
10. Click **Attach Selected**.

Export Invoices to Spreadsheet

The Export to Excel® functionality gives you the ability to export select invoices to a Microsoft Excel® spreadsheet.


To export invoices to a spreadsheet

1. Go to the Cost Summary page.
For more information, see [Access the Project Cost Summary Page](#).
2. Click the **Actual Costs** link located in the left navigation bar.
The Actual Costs Page displays.

Tip

Use the filter to narrow results to show only Closed commitments. This will help you access the desired commitment more easily.



3. Click the Export to Excel icon ().
The File Download dialog box displays.
4. Click **Open**, **Save**, or **Cancel**.

Actual Costs Page Overview

The Actual Costs page helps you manage your project invoices. This page provides an overview of the project's budget in terms of the invoices that have been paid, those pending and projected. From here you can add/ view invoices and their statuses. The Actual Cost Summary, Quick Cost Summary and All Invoices table are the three sections that make up this page. The Quick Cost Summary is a common component throughout the Cost module and it's an effective way to navigate between various areas of a project's budget including funding sources, invoices, budget commitment details and more.

A detailed description of the sections, fields and buttons located on this page is provided below.

Actual Costs Summary

The Actual Costs Summary section gives you a snapshot of the projects invoices to date.

Quick Cost Summary

The Quick Cost Summary section offers a more condensed, yet comprehensive view of the budget, providing current status of the original budget, current commitments and invoices paid to date.

- **Current Budget:** This is the approved original budget and all approved budget changes.
- **Current Commitments:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows: (approved commitment changes) + (original commitments) + (approved general invoices).
- **Actuals Approved:** This is the amount of all approved invoices.
- **Actual Cost to Complete:** This is the total invoice amount needed to fulfill all commitments. The formula is as follows: (projected commitments) (actuals approved).
- **Available Funds:** This is the total amount of funds available in your funding sources.

Note: Funds are not depleted from the funding source until invoices have been approved. This total does not take into account invoices marked received.

- **Forecasted Over/ (Under):** This figure represents an amount above or under the forecasted budget. This total is the difference between the estimate at completion and the current budget. The formula is as follows: (estimate at completion) (current budget). For more information on the forecasting utility, see Forecasting.

Invoices Results Table

By default, this table is titled All Invoices, but the title will change according to what is selected in the filter. This results table provides an overview of project invoices.

- **Filter:** At any given time, a project's invoice inventory can be vast, making the All Invoices table very compact and difficult to search through. The filter allows you to narrow table results by invoice status and/or invoice type (all, commitment or general).



Show:

To use the filter

- Click the **All** drop-down arrow to select invoices statuses to filter by.
- Click the **All Invoices** drop-down arrow to select invoice types to filter by
- Click **Go** to display results in the table below.
- Click **Show All** to quickly reset the filter and display all available invoices.

Buttons

- **Mail Merge:** Click to open a mail merge document. In e-Builder, a mail merge document is a Microsoft Word® or PDF® print out of the data currently in view. Mail merge templates can be generic, providing just the data currently in view, or custom. If a template has not been created for your project, a generic printout opens. Custom templates provide additional cost data. These templates are created by your e-Builder Administrator and can be tailored with field mappings to capture very specific cost information. For more information, see Cost Mail Merge Templates.
- **Add Invoice:** Click to add invoices. For detailed steps, see Add Commitment Invoices or Add General Invoices.
- **Export to Excel®:** Click this icon to send the current table view of invoices to an Excel spreadsheet.

Fields

- **Invoice Number:** This field displays the invoice number. Click this link to open the Invoice Details page to view detailed information or take action on the invoice. For more information on taking action on an invoice, see Working with Invoices.
- **Description:** This field displays the description of the invoice. Click this link to open the Invoice Details page to view detailed information or take action on the invoice. For more information on taking action on an invoice, see Working with Invoices.
- **Commitment #:** This field is populated only for commitment invoices and displays the commitment number of the commitment the invoice is associated with. Click this link to open the Commitment Details page.
- **Commitment Description** This field is populated only for commitment invoices and displays the description of the commitment the invoice is associated with. At a glance, you are able to determine the commitment item, without having to go any further than this page or do more research.
- **Company:** This field displays the name of the company the invoice was or will be paid to. Click this link to open the Company Details page and view more detailed information about the company.
- **Date Received:** This field displays the date that the invoice entered into the system.
- **Status:** This field displays the status of the invoice.
- **Invoice Amount:** This field displays the amount of the invoice.

Invoice Details Page

The Invoice Details page allows you to add or edit details such as information about the invoice and linked files, forms or processes.

To access the Invoice Details page

1. From the top navigation tabs, click the **Cost** tab.
2. Choose a project from the **All Projects** drop-down menu.
3. On the Project Cost Summary page, click the **Actual Costs** link located in the left navigation bar.
4. In the Quick Cost Summary section, click the invoice number to view the Invoice Details page.

A description of the fields, buttons and tabs on this page is provided below.

Toolbar Buttons

- **Mail Merge:** Click to open a mail merge document. In e-Builder, a mail merge document is a Microsoft Word® or PDF® print out of the data currently in view. Mail merge templates can be generic, providing just the data currently in view, or custom. If a template has not been created for your project, a generic printout opens. Custom templates provide additional cost data. These templates are created by your e-Builder Administrator and can be tailored with field mappings to capture very specific cost information. For more information, see Cost Mail Merge Templates.
- **Controlling Process:** This field displays on the details table if a cost process exists for the invoice approval. If the process is not yet completed (not in the approve or void status) it can only be updated in the process and not in the Cost module; in which case the action buttons (Make Pending, Make Projected, Edit, etc.) will not display.
- **Mark Received:** Click to mark an invoice received. Marking an invoice Received is a way to let team members know that the invoice has been received, entered in e-Builder and is ready to be approved, and then paid. For instructions, see Mark Invoice Received.

Note: If a funding rule has not been set on the invoice, you will not be able to take action on the invoice (Mark Received, Request Approval etc.)

- **Request Approval:** Click to request an invoice approval. For instructions, see Request Invoice Approval.
- **Note:** If a funding rule has not been set on the invoice, you will not be able to take action on the invoice (Mark Received, Request Approval etc.)
- **Approve:** Displays for users with Approve Final Actual permissions. Click to approve an invoice. For instructions, see Approve Invoices.
- **Mark Paid:** Click to mark an invoice as paid. Typically, an invoice is marked as paid when the accounting department has issued a check to the vendor. Once an invoice has been marked as paid, it cannot be deleted; to remove the paid invoice from the budget, you must void it. For instructions, see Mark Invoice Paid.
- **Delete:** Click to delete a draft invoice. This button displays for drafts invoices only. Approved invoices cannot be deleted; they must be voided in order to be removed from the budget. The appearance of this button is permissions-based and appears for users with Add/ Edit Actual permissions. For instructions, see Delete Invoices.
- **Void:** Displays for users with Add/ Edit Actual permissions. Click to void an invoice. Invoices that may have been approved in error can be voided in order to be removed from the project's budget. A voided invoice cannot be paid and the invoice amount will not be included in the actual totals. You can also void invoices marked as paid. This is helpful, for example, for situations in which accounts

payable short bills or cancels an invoice (for example, if they require that a new invoice be submitted). It is not necessary to offset a paid invoice by creating another invoice. With the right permissions, you can simply void paid invoices if necessary. For instructions, see Void Invoices.

- **Edit:** This button is displayed for users with Add/ Edit Actual permissions. Click to edit the details of the invoice. For instructions, see Edit Invoice Details.

Invoice Overview Tab

Provides a quick overview of the invoice. Use to glean general information about the invoice such as the status, associated commitment, amounts, pertinent dates, etc. The left and right arrows in the Invoice Number field allow you to skip to the next or previous invoice on the project in sequential order.

Other Details Tab

Provides additional information about the invoice with a little bit more detail as compared to the Invoice Overview tab. Click to view the dates that the invoice was created, approved, voided, due and paid.

Funding Summary Tab

Provides a list of all project funding sources as well as the amount that the invoice has pulled from each respective source. Use to see how much project funds are available, how much of the invoice is taken from each funding source in order to determine whether or not funding rules need to be adjusted.

Invoice Items Tab

Provides a list of all the invoice items that are linked to this invoice. Clickable links enable you to access related pages for further information or to take related action. Click the funding rule link to open the Funding Source Distribution modal for a breakdown of funding distributions for this invoice.

Note: The fields that are described below will differ for Payment Application commitments. See About the Payment Application for a description of these columns.

- **Paper Clip Icon:** Click this icon to view and access documents that have been attached to this invoice item. Attachments can be added by editing the invoice. For instructions, see Add Documents to Invoice Line Items.
- **Show Approved Commitment Items:** This check box displays for commitment invoices against non-pay app commitments that include unapproved commitment items. This check box displays for all commitment invoices against non-pay app commitments. By default, this tab displays only those commitment items that have been fully or partially paid. Select this check box to also see commitment items not yet paid/ un-invoiced commitment items.
- **Edit Amounts:** This link displays for invoice items in draft status, with retainage release amounts in the Released This Invoice column. Click this button to modify retainage released amounts. For more information on how retainage release works in e-Builder, see About Retainage Release in e-Builder. This link will only appear for commitment invoices.
- **Commitment Item #:** This is the commitment item number of the item this invoice is associated with.
- **Description** This is the description of the invoice item.

- **Current Commitment:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows: (approved commitment changes) + (original commitments) + (approved general invoices).
- **Invoiced to Date:** This is the amount that has been invoiced to date.
- **Retained to Date:** This is the amount that has been retained to date according to the retainage percent entered on the Commitment/ Commitment Item page.
- **Released This Invoice:** This is the amount of retainage that has been released for the selected invoice.

Custom Fields Tab

Displays invoice custom fields that have been created for the account. For more information on commitment custom fields, see Cost Custom Fields.

Notes Tab

Displays notes that have been added to the invoice. From here you can also add notes to the invoice.

Documents Tab

Displays files that have been attached to the invoice. From here you can also attach or remove documents from the invoice.

Forms Tab

Displays forms that have been attached to the invoice. From here you can also attach or remove forms from the invoice.

Processes Tab

Displays processes that have been attached to the invoice. From here you can also attach or remove processes from the invoice.

Add Invoice Page

The Add Invoice page allows you to choose whether you are adding a general or commitment invoice. A description of the buttons located on this page is provided below:

- **Commitment Invoice:** Click to add a commitment invoice. A commitment invoice is an actual cost that is applied against an existing commitment.
- **General Invoice:** Click to add a general invoice. General invoices are not associated with commitments and may be issued for a subset of a budget line item, such as legal fees, builder permits etc. things that are required to be paid on the project, but not project-based contracts such as flooring, and other building material.
- **Cancel:** Click to cancel this action and not add any invoices.

Related Topics:

- Add Commitment Invoices
- Add General Invoices

Add/ Edit Commitment Invoice Page

A commitment invoice is an actual cost that is applied against an existing commitment to track how much of that commitment has been paid out to date or is still outstanding. The Add/Edit Commitment Invoice page allows you to add commitment invoices or make modifications to the details of a commitment invoice.

To access the Add Commitment Invoice page

1. From the top navigation tabs, click the **Cost** tab.
2. Choose a project from the **All Projects** drop-down menu.
3. On the Project Cost Summary page, click the **Actual Costs** link located in the left navigation bar.
4. In the Quick Cost Summary section, click **Add** and then select **Commitment Invoice**.

A detailed description of the fields and buttons located on the Add/ Edit Commitment Invoice page is provided below.

Toolbar Buttons

- **Save and Add New:** (Add Mode) Click to save the new commitment invoice and then add a new one.
- **Save:** Click to save the invoice.
- **Cancel:** Click to cancel any edits you've made. All unsaved changes will be lost.

Invoice Overview Section

- **Project:** If adding an invoice via the Data Entry Menu, click to select a project. Otherwise, this field displays the project name by default.
- **Commitment:** Click to select the commitment you are invoicing against.
- **Invoice Number:** If the auto-fill feature is enabled in cost controls the invoice item number displays by default; otherwise, you must enter an invoice change in this field.
- **Date Received:** Displays the date the invoice was received. Depending on Cost Settings, this field may auto-populate with the present date when in Add mode. In edit mode, this field cannot be modified.
- **This is a retainage release:** Does not display for payment-application type commitments, because a separate invoice is not needed to release retainage on these commitment types. For more information on the payment application feature, see About the Payment Application. Select this check box to process a retainage release invoice. See, About Retainage Release in e-Builder to learn more.
- **Description:** Enter a description of the invoice in this field.
- **Status:** Displays the status of the invoice.
- **Company/Contact:** Displays the name of the company and contact the commitment was made with.
- **Date Due:** Click the calendar icon to select a due date for the invoice.
- **Retainage mode:** This field is displayed only if the **Support manual entry** check box has been selected in the **Retainage amount** field while adding or editing the commitment.
 - **Default:** This option button is selected by default. When selected, the invoice amount retained for a period cannot be edited manually.

- **Manual:** Select this option button to allow manual override of retainage amounts on invoice line items. When selected, the **Retained This Invoice** column values can be manually edited.

Invoice Items Section

- **Import Invoice Items:** Displayed if a payment application type commitment is selected from the Commitment drop-down menu. Click to import invoice items or a schedule of values into the system. For more information on the payment application feature, see About the Payment Application.
- **Manage Funding:** Click to use the funding distribution tool to automatically or manually distribute funds from funding sources/categories to the selected item. See Funding Distribution, to learn more.
- **Reset Retainage:** Select one or many invoice item rows and click this button to reset the retainage amount or retainage percentage to the original value.


Note: Only users with the Edit Retainage on Actual permissions can manually edit the retainage percentage or retainage amount.

The Confirm Reset Retainage window will be displayed asking you to confirm whether the changes made to the retainage percentage or retainage amount can be reset. Click **Continue** to confirm the reset. Click **Save** to retain the changes.

Note: This button is displayed only for commitment invoices in the Draft or Received status on a Non-Pay app commitment that has manual retainage entry supported (in the Retainage Amount field on the page) and the Manual retainage mode enabled (on the Add/ Edit Commitment Invoice page). At least one invoice item must be selected for this button to be enabled.

- **Add From Daily Reports:** Displayed only if a dynamic cost process is configured for the account. For more information, see Dynamic Cost Management.
- **Funding Rule:** Click to select a funding rule for this invoice. Click the Edit link to create a custom funding rule.
- **Invoice Amount:** Enter the amount of the invoice in this field.
- **Retainage Release:** Displayed and can be edited when the **This is a retainage release** check box is selected. Enter the amount of retainage to be released for this invoice.

Note: You are not able to action an invoice (request approval, approve etc.) if the amount of released retainage is larger than the amount retained to date.

-  - **Edit Custom Fields Icon:** This is the Edit Custom Fields icon and it displays toward the end of the Invoice Items table. Please note that if you are viewing a pay-app commitment, you might have to scroll to the right in order to see this icon. Click to complete invoice item custom fields. If these fields are required, you are not able to save the invoice until these fields have been completed. See Add Invoice Item Custom Fields for steps on configuring these custom fields.

Add/ Edit General Invoice Page

General invoices are not associated with commitments and may be issued for a subset of a budget line item, such as legal fees and builder permits that are required to be paid on the project, but not project-based contracts such as flooring, and other building material.

The Add/Edit General Invoice page allows you to add general invoices or make modifications to the details of a general invoice.

To access the Add General Invoice page

1. From the top navigation tabs, click the **Cost** tab.
2. Choose a project from the **All Projects** drop-down menu.
3. On the Project Cost Summary page, click the **Actual Costs** link located in the left navigation bar.
4. In the Quick Cost Summary section, click **Add** and then select **General Invoice**.

To access the Edit General Invoice page

1. From the top navigation tabs, click the **Cost** tab.
2. Choose a project from the **All Projects** drop-down menu.
3. On the Project Cost Summary page, click the **Actual Costs** link located in the left navigation bar.
4. In the Quick Cost Summary section, click the invoice number to view the Invoice Details page.
5. Click **Edit**.

A detailed description of the fields and buttons located on this page is provided below.

Invoice Overview

- **Project:** If adding an invoice via the Data Entry Menu, click to select a project. Otherwise, this field displays the project name by default.
- **Invoice Number:** If the auto-fill feature is enabled in cost controls, the invoice item number is displayed by default; otherwise, you must enter an invoice change in this field.
- **Company:** Displays the name of the company the invoice made out to. Click to select from a list of companies.
- **Company Number:** Displays the company number and will auto-fill when the company name is selected in the field above it.
- **Date Received:** Displays the date the invoice was received. In add mode, this field auto-fills with the present date. In edit mode, this field cannot be modified.
- **Scope of Work:** Enter the scope of work in this field.
- **Description:** Enter a description of the invoice in this field.
- **Status:** Displays the status of the invoice.
- **Contact:** Displays the name of the contact person for this invoice. Click the drop-down arrow to make a selection.
- **Date Due:** Click the calendar icon to select a due date for the invoice.

Invoice Items

- **Manage Funding:** Click to use the funding distribution tool to automatically or manually distribute funds from funding sources/categories to the selected item. For more information, see Funding Distribution.
- **Invoice Number:** Although editable, this column auto-populates invoice item numbers sequentially as additional items are added.
- **Budget Line Item:** Click **Please Select A Line Item** to open the **Budget Line Items** dialog box and click an account code number to make a selection to link the invoice item to.
- **Description:** Although editable, this column auto-populates with the budget line item description once selected.
- **Funding Rule:** If funding sources are enabled on the budget level, this field auto-populates the funding rule associated to the budget line item. To make changes, click this drop-down arrow to select a funding rule for the invoice item. Click the Edit link to customize funding source distributions.

Note:

- **(Draft Invoices)** Although you can save items without a funding rule selected, you are not able to action the item (request approval or approve) until a funding rule is entered.
- **(Approved Invoices)** You are not able to save an invoice item on an approved invoice until a funding rule is entered.
- **Amount:** Enter the amount of the invoice item in this field. You are not able to add additional items to approved invoices.
- **Note: (Approved Invoices)** You are not able to add amounts for approved invoices.
- **Add:** Click this link to add the new invoice item.

Add/ Edit Master Invoice Page

The Add/Edit Master Invoice page allows you to add master invoices or make modifications to the details of a master invoice.

A detailed description of the fields and buttons located on this page is provided below.

Invoice Overview

Toolbar Buttons

- **Save and Add New:** Click to save the master invoice and add a new master invoice.
- **Save:** Click to save the master invoice.
- **Cancel:** Click to cancel any edits you've made. All unsaved changes will be lost.

Fields

- **Master Commitment*:** Select the master commitment for the invoice. Master commitments are contracts that span more than one e-Builder project, so they are typically set up to handle a program manager, architectural/ engineering firm, or job order contractor that has been engaged by an owner to provide services on more than one project.

- **Master Invoice Number***: Enter the number for the master invoice. This value may be an auto-filled number or user-entered invoice number depending on the Account Cost setting.
- **Date Received***: Enter or select the date when the invoice was received. This can be set to the date that someone creates a master invoice by default or a user-entered date, based on the setting in Account Settings.
- **This is a retainage release**: Select this check box to process a retainage release invoice. For more information, see About Retainage Release. Select this check box to flag the master invoice as solely an invoice designed to release retainage.
- **Description***: Enter a description for the master invoice. For example, Pay Application for February 2021.
- **Status***: Select the status. The available statuses are: Draft, Received, Approved, Paid, or Void.
- **Company/ Contact**: For master invoices, this is the company that has the master commitment against which master invoices will be submitted.
- **Date Due**: Enter or select the desired due date for the payment.

Master Invoice Items

Toolbar Buttons

- **Download Schedule of Values Worksheet.xls**: Click this link to download and save the schedule of values worksheet (.xls file format) to your computer. This link is available when the master commitment is selected in the Invoice Overview section above.
- **Import Invoice Items**: Click to import master invoice items (.xls file format) using the Import Invoice Items popup. This button is available when the master commitment is selected in the Invoice Overview section above.
- **Manage Funding**: Click to display the Funding Distribution popup and view the invoice amounts allocated for each item against the available funding sources. This button is available only when funding is enabled on actuals for Account Level Cost.

Fields

- **Commitment Item #**: The item number of the master commitment that is being invoiced against.
- **Description**: The item description of the master commitment Item that is being invoiced against.
- **Account Code**: The budget line item number that is linked to the master commitment item that is being invoiced against.
- **Funding Rule**: If a funding rule has been created on the associated project, this allows a user with funding permissions to select the appropriate funding rule for each line item. If a custom allocation of funding is created on an invoice, this field will display the term "Custom".
- **Current Commitment**: The approved value of the master commitment item that is being invoiced against. This value cannot be entered by the user.
- **Invoiced To Date**: The total value that has been invoiced to date against the master commitment item (this changes based on invoice status, so when the invoice status is Draft, Received, or Void, it does not include the current Invoice Item Amount. Once the status changes to Approved or Paid, the current Invoice Item Amount is included).

- **Retained To Date:** The total value that has been retained to date against the master commitment item (this changes based on invoice status, so when the invoice status is Draft, Received, or Void, it does not include the current Invoice Item Retainage Amount. Once the status changes to Approved or Paid, the current Invoice Item Retainage Amount is included.)
- **Remaining to be Invoiced:** The Current Commitment value minus the Invoiced To Date value.
- **Invoice Amount:** The amount (user- entered) that is being invoiced against the master commitment item.
- **Retainage %:** The retainage percentage and this value is equivalent to the master commitment item's retainage percent.
- **Retained This Invoice:** The amount retained in this invoice. The value is calculated by multiplying the retainage percentage and the invoice amount (Retainage % x Invoice Amount).
- **Custom Fields:** Click on the icon to display the master invoice custom fields configured for the account.

Master Invoice Custom Fields

This section displays master invoice custom fields that have been created for the account.

Import Invoices Page

Note: Depending on your account settings this page may or may not be available to you. The Cost import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager.

You can import invoices using a three-step import wizard. A description of each step of the wizard is provided below.

Step 1 of 3

- **Project Identifier:** Select a Project Identifier. This is a unique ID that will identify which project the budget import is for, examples include project name and project number. Project identifiers are entered into e-Builder as required project custom fields. For multiple options to display, the **Do not allow duplicates** check box must be selected on the Edit Custom Fields page.
- **Browse....:** Click to browse for and select the import file.

Step 2 of 3

- **(Field Mappings):** Use this section to map the fields in your spreadsheet to the default invoice built-in fields in e-Builder. For each required and optional built-in field, click the drop-down arrow and select the corresponding field in the spreadsheet. If the column names in your spreadsheet are identical to the built-in fields, they will populate automatically.
- **Previous:** Click to return to the previous page.
- **Next:** Click to go to the next step of the import process after all fields have been completed.
- **Cancel:** Click to cancel the import process and return to the Data Entry page.

Step 3 of 3

- **(Preview)**: The Preview tab is displayed by default and allows you to review the details of the import; whether it was successful or not. If there were errors, details display on the Exceptions tab.
- **Exceptions Tab**: Lists all errors, if any. Click the Export Exceptions button to export details to a spreadsheet.
- **Warnings Tab**: Lists all warning messages, if any.

Update Invoice Payment Status Page

Note: Depending on your account settings this page may or may not be available to you. The Cost import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager.

You can import invoice payment statuses using a three-step import wizard. A description of each step of the wizard is provided below.

Step 1 of 3

- **Project Identifier**: Select a Project Identifier. This is a unique ID that will identify which project the budget import is for, examples include project name and project number. Project identifiers are entered into e-Builder as required project custom fields. For multiple options to display, the **Do not allow duplicates** check box must be selected on the Edit Custom Fields page.
- **Reject Invoices if amount paid does not equal invoice amount?**: Select this check box to automatically ignore invoices that do not have the same invoice and invoice payment amount.
- **Browse....**: Click to browse for and select the import file.

Step 2 of 3

- **(Field Mappings)**: Use this section to map the fields in your spreadsheet to the default invoice built-in fields in e-Builder. For each required and optional built-in field, click the drop-down arrow and select the corresponding field in the spreadsheet. If the column names in your spreadsheet are identical to the built-in fields, they will populate automatically.
- **Previous**: Click to return to the previous page.
- **Next**: Click to go to the next step of the import process after all fields have been completed.
- **Cancel**: Click to cancel the import process and return to the Data Entry page.

Step 3 of 3

- **(Preview)**: The Preview tab is displayed by default and allows you to review the details of the import; whether it was successful or not. If there were errors, details display on the Exceptions tab.
- **Exceptions Tab**: Lists all errors, if any. Click the Export Exceptions button to export details to a spreadsheet.
- **Warnings Tab**: Lists all warning messages, if any.

Funding Distribution

Funding distribution applies to commitments, commitment changes and invoices. While funding rules allow you to distribute funds based on a fixed ratio, the funding distribution mechanism allows you to deplete all funding sources equally based on the sum of the individual funding sources. This feature helps you ensure that

funds are depleted from funding categories at the same rate. Essentially, if you auto-adjust funding ratios, each category should result in a \$0.00 balance at the same time. This takes the thought and mathematics out of knowing the ratio between funding sources based on their individual totals. This is especially useful if there are numerous funding sources and categories and you need to ensure that money is withdrawn from each funding source at appropriate ratios.

How it works in e-Builder:

Funding distribution management is available for projects that have funding sources/categories defined and the account is set to use funding at the commitment and actual costs levels. This feature will not be available if funding is enabled for actual cost items only. Additionally, commitment and invoice items must not be in approval requested status in order to use this feature.

For commitment changes in particular, funding distribution can only be entered for additional scope items entered on the change. For change items on existing commitment items, the funding distribution will be shown as read-only. The check boxes for these items will be disabled and will therefore be excluded from the auto-adjust feature. The totals at the bottom however will include funding distribution for all items in the change.

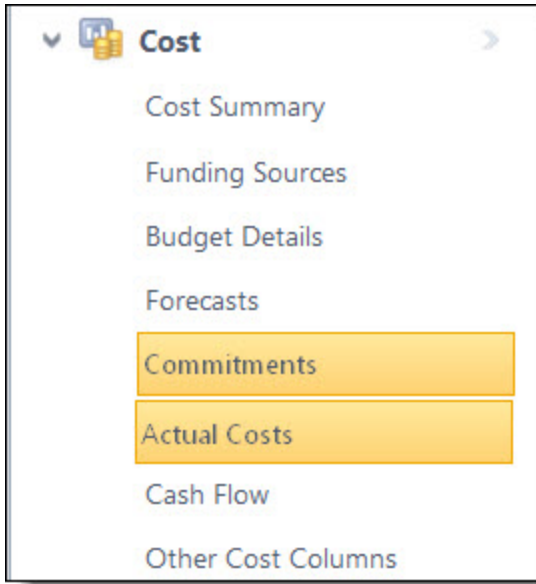
From the funding distribution page you can view current distributions per funding category/ source and compare their contribution percentages based on the original, committed and adjusted funds. Use this page to redistribute funds between funding sources either manually or using the auto-adjust feature, which will redistribute funds at an equal ratio, based on the total funds in each funding category or funding source if categories do not exist.

The following are topics related to using the funding distribution screen:

- [Access Funding Distribution Pop-Up Window](#)
- [Funding Distribution Page Overview](#)

[To access the funding distribution for commitments or actual costs](#)

1. Click the **Cost** tab on the top navigation.
2. Click the **Commitments** or **Actual Costs** link located in the left navigation bar.



3. Click the title of the commitment or invoice.

Below is an overview of the fields and buttons located on the Funding Distribution page.

Funding Distribution - 006		Auto-Adjust Funding Ratios				Save	Cancel
		<input checked="" type="checkbox"/>	Board of Regents				
	Original	3,000,000.00	2.42%				
	Committed	6,000.00	5.45%				
	New	13,147.01	2.85%				
	(Over)/Under	(1,951.53)					
Line Item	Description	Amount	Total	Bond1	DC Creative Arts	Atlanta Legislature	Board of Reger
<input checked="" type="checkbox"/> 001	Land Aquisition - Purchase	350,000.00	352,000.00	2,000.00	5,147.01	118,777.26	197,638.73
Total		350,000.00	352,000.00	2,000.00	5,147.01	118,777.26	197,638.73
Funds Available				(2,000.00)	2,988,852.98	49,825,222.74	59,796,361.11
Category Total					7,147.01		

Fields and Buttons

The fields and buttons located on this page are:

- **Auto-Adjust Funding Ratios:** A check box is available for each category (funding source if no categories are defined), to indicate whether this category is included in the auto-adjustment function. If unchecked, the amounts entered for funding sources in that category will be left untouched by the auto-adjust function. The amounts will be locked in to the values as entered. The Auto-Adjust Funding Ratios button will try to distribute the amounts in the (Over) / Under row for each category in order to bring the ratio as close as possible to the ratio indicated by the Committed row.
- **Save:** This button displays only in edit mode. Click this button to save changes.
- **Cancel:** Click this button to exit this page and cancel any actions taken. All unsaved changes will be lost.

Commitments and Commitment Changes

- **Original:** This row represents the total amount of funds present in each funding category as well as all adjustments added to each funding source in the funding category. When the category check box is selected the original ratio between the categories display.
- **Committed:** This row represents the total approved commitments and general invoice amounts towards this category/ source. This also includes all approved commitments and general invoices that have money being allocated on sources in this category. When the category check box is selected the percent ratio based on what has been committed so far displays.
- **New:** This row represents the total approved commitment amount towards this category/ source plus the amount about to be committed on the current commitment for that category/ source based on changes made in the funding source amount text boxes below. This amount is automatically updated as the amounts in the funding text boxes change. Based on the distribution, the new ratio percentage is calculated and displayed, if the category check box is selected. The percentages are highlighted in red if they differ from the committed ratio values.
- **(Over)/ Under:** This row indicates the amount that must be deducted or added to the funding distribution for this commitment/ commitment change in order to maintain the same ratio as on the committed funding. This amount will be automatically updated as the amounts in the funding text boxes are updated.

Invoices

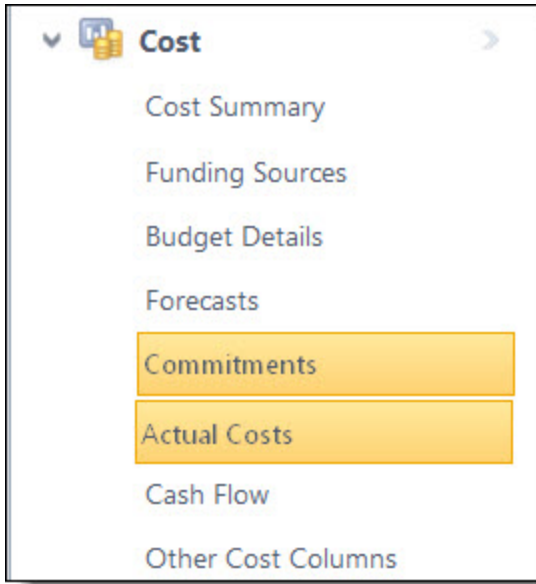
- **Commitment Invoice Number:** This row represents the amount that was distributed for the commitment from that category/ source. The percent as it was on the commitment displays when the category check box is selected.
- **Invoiced:** This row represents the approved invoice amount that has already been spent from this category only on invoices for this commitment.
- **New:** This row represents the sum of the amounts spent and the distribution per invoice for select funding categories / sources.
- **Over/ Under:** This row represents the adjustments necessary to make the ratio of funding distribution for this invoice match what was planned for this commitment (first row).

Access Funding Distribution Pop-Up Window

The Funding Distribution pop-up window can be accessed for commitments or actual costs. The procedure below describes steps for both.

To access the Funding Distribution pop-up window

1. Click the **Cost** tab located on the Top Navigation Tabs.
2. Click the **Commitments** or **Actual Costs** link located in the left navigation bar.



3. Click the title of the commitment or invoice you want to view funding for.
4. Click **View Funding**.

Funding Distribution Page

Below is an overview of the fields and buttons located on the Funding Distribution page.

Funding Distribution - 006

Auto-Adjust Funding Ratios Save Cancel

Board of Regents

Original 3,000,000.00 2.42%

Committed 6,000.00 5.45%

New 13,147.01 2.85%

(Over)/Under (1,951.53)

Line Item	Description	Amount	Total	Bond1	DC Creative Arts	Atlanta Legislature	Board of Reger
<input checked="" type="checkbox"/> 001	Land Aquisition - Purchase	350,000.00	352,000.00	2,000.00	5,147.01	118,777.26	197,638.73
	Total	350,000.00	352,000.00	2,000.00	5,147.01	118,777.26	197,638.73
	Funds Available			(2,000.00)	2,988,852.89	49,825,222.74	59,796,361.11
	Category Total				7,147.01		

Fields and Buttons

The fields and buttons located on this page are:

- **Auto-Adjust Funding Ratios:** A check box is available for each category (funding source if no categories are defined), to indicate whether this category is included in the auto-adjustment function. If unchecked, the amounts entered for funding sources in that category will be left untouched by the auto-adjust function. The amounts will be locked in to the values as entered. The Auto-Adjust Funding Ratios button will try to distribute the amounts in the (Over) / Under row for each category in order to bring the ratio as close as possible to the ratio indicated by the Committed row.
- **Save:** This button displays only in edit mode. Click this button to save changes.
- **Cancel:** Click this button to exit this page and cancel any actions taken. All unsaved changes will be lost.

Commitments and Commitment Changes

- **Original:** This row represents the total amount of funds present in each funding category as well as all adjustments added to each funding source in the funding category. When the category check box is selected the original ratio between the categories display.
- **Committed:** This row represents the total approved commitments and general invoice amounts towards this category/ source. This also includes all approved commitments and general invoices that have money being allocated on sources in this category. When the category check box is selected the percent ratio based on what has been committed so far displays.
- **New:** This row represents the total approved commitment amount towards this category/ source plus the amount about to be committed on the current commitment for that category/ source based on changes made in the funding source amount text boxes below. This amount is automatically updated as the amounts in the funding text boxes change. Based on the distribution, the new ratio percentage is calculated and displayed, if the category check box is selected. The percentages are highlighted in red if they differ from the committed ratio values.
- **(Over)/ Under:** This row indicates the amount that must be deducted or added to the funding distribution for this commitment/ commitment change in order to maintain the same ratio as on the committed funding. This amount will be automatically updated as the amounts in the funding text boxes are updated.

Invoices

- **Commitment Invoice Number:** This row represents the amount that was distributed for the commitment from that category/ source. The percent as it was on the commitment displays when the category check box is selected.
- **Invoiced:** This row represents the approved invoice amount that has already been spent from this category only on invoices for this commitment.
- **New:** This row represents the sum of the amounts spent and the distribution per invoice for select funding categories / sources.
- **Over/ Under:** This row represents the adjustments necessary to make the ratio of funding distribution for this invoice match what was planned for this commitment (first row).

Forecasting

Note: Forecasting is a feature that must be enabled by tech support. For assistance, please contact your e-Builder account manager.

The Forecasting feature grants users permission to properly forecast anticipated costs, providing more accurate over/under for each of your projects. Approved budgets are the foundation of your forecasts. As time progresses on the project your forecast will take into consideration professional estimations by the project manager to reflect real life circumstances. The forecast will then be adjusted for each budget line item as appropriate, which will automatically affect the Estimate at Completion and Forecasted Over/Under (variance) calculations.

Why Forecast?

Forecasting is really the core of any business plan because you must identify your destination before you can figure out the best path. A forecast is not 100% accurate, but accurate enough to identify possible risks. The earlier you know about a possible risk the better off you are in eliminating it. Forecasting allows you to be as proactive as possible, to mitigate potential risks.

Often people refer to forecasting as a mysterious process; no one can predict the future. However, it is possible to make reasonable predictions or assumptions on how events will turn out based on the logical assessment of the facts presented to you. You will get better at it the more you do it and the more experience you gain on the field.

In the world of construction, forecasting is a key ingredient to meeting or beating your budgets. By instituting a disciplined forecasting process you can communicate the anticipated cost of the project (and program) with much greater certainty. That process involves putting together carefully reasoned assumptions based on professional estimates, logs (like potential change order log, RFI log, issue log, etc.) IT, furniture and equipment lists to name a few quantified in a systematic way to make your projections as accurate as humanly possible. Some of this information will be contained in various logs in your e-Builder reports, forms and documents.

Using the forecasting feature requires adjustments to your views and key reports, training on the 'how to', and most importantly, a potential change in the forecasting process. Once forecasting is enabled in the account, when accessing the forecasting menu in the administration tools it will clearly show it is enabled.

To guide you through working with forecasting in e-Builder, the following sections are included in this section:

- [Access the Forecasting Page](#)
- [Working with Forecasts](#)
 - [Create a Forecast](#)
 - [Edit Forecasts](#)
 - [Print Forecast Data](#)
 - [Create Forecast Snapshots](#)
 - [Attach Documents to Forecasts](#)
 - [Attach Forms to Forecasts](#)
 - [Attach Processes to Forecasts](#)

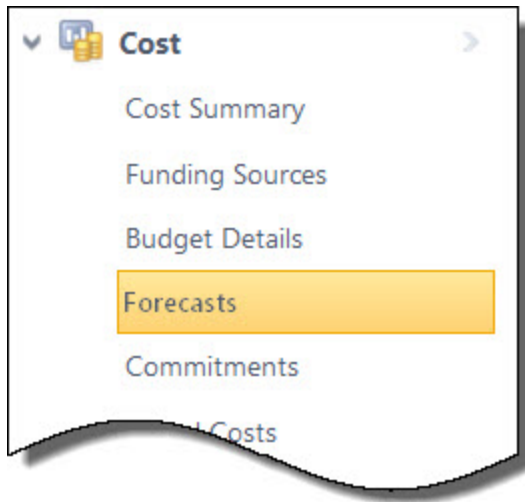
[Access the Forecasting Page](#)

Note: The Forecast cost entity does not appear in the Cost module by default. If it is not available on your account, your e-Builder administrator must enable this functionality in Forecast Settings before you are able to view it in the user interface. For more information, see [Forecast Settings Page Overview](#).

[To access the Forecast page](#)

1. Go to the Cost Summary page.
For more information, see [Access the Cost Summary Page](#).

2. Click the **Forecasts** link located in the left navigation bar.



Create a Forecast

Note: The Forecast cost entity does not appear in the Cost module by default; this feature must be enabled by e-Builder Support.

Forecasts are initially added to e-Builder only one time. If a forecast has already been created, but you'd like to forecast new assumptions, you must create a new current or working forecast; for more information, see Edit Forecasts.

To create a forecast

1. Go to the Forecasting page.
For more information, see Access the Forecasting Page.
2. Click **Add Forecast**.
The Add Forecast page is displayed.
3. Click the **Forecast as of period ending** drop-down arrow to select the data for which to base the forecast on.
4. Click **Continue**.
The Add/ Edit Forecast page is displayed.

Tip

Tab through the fields while adding new forecast items to automatically add a new line to the grid.

5. Enter all required fields.
For a detailed description of the fields and buttons located on this page, see Add/Edit Forecast Page Overview.
6. From here you can optionally take any of the following actions:

- Attach Documents to Forecasts
 - Attach Forms to Forecasts
 - Attach Processes to Forecasts
7. Click **Save Draft** to keep a draft to continue working on at a later date

—Or—

Click **Save Final** to save this version as the final forecast. You are required to either save the final version as a snapshot of the current forecast or just as the current forecast.

Note: In order to report on the forecast, you must save final.

8. To save as both a snapshot and current forecast, click **Yes, Save Snapshot & Forecast**.

—Or—

To save as forecast only, click **No, Save Forecast Only**.

Related Topics:

- [Add/Edit Forecast Page Overview](#)

Edit Forecasts

The forecast is only as good as the information that's entered, so it is essential that it's updated regularly. If an existing forecast is available to edit (also referred to as a Working Forecast) then click the name of the working forecast to edit it. Once at least one forecast has been created then an Edit Forecast button will be available.

You have the ability to edit current or working forecasts if both have already been created. Current forecasts are those that have been published and its data is reflected in the Cost Summary and in reports (For information on customizing cost summary layouts to include forecast columns, see [Add Cost Summary Layouts](#)).

Working forecasts are in edit mode and available to continue working on. If a forecast has not yet been created, see [Create a Forecast](#) for detailed instructions.

To edit forecasts

1. Go to the Forecasting page.
For more information, see [Access the Forecasting Page](#).
2. Click **Edit Forecast**.
3. If a working forecast does not exist, go to step 4, otherwise, a message displays prompting you to choose the forecast you'd like to edit
4. Select the **Edit existing working forecast** to make change to the existing working forecast.
—Or—
Select the **Start new working forecast from current forecast** to start a new working forecast with data saved from current forecast to start with. This working forecast will overwrite the existing one.
5. Click the **Forecasts as of period ending** drop-down arrow and select a period to base the forecast on. Choose **Live** to edit the forecast based on current data.
6. Click **Continue**.
The Add/ Edit Forecast page is displayed.

Tip

Tab through the fields while adding new forecast items to automatically add a new line to the grid.

7. Enter all required fields. For a detailed description of the fields and buttons located on this page, see [Add/Edit Forecast Page Overview](#).
8. From here you can optionally take any of the following actions:
 - Attach Documents to Forecasts
 - Attach Forms to Forecasts
 - Attach Processes to Forecasts
9. Click **Save Draft** to keep a draft to continue working on at a later date
—Or—
Click **Save Final** to save this version as the final forecast.

Print Forecast Data

Forecast data can be printed from the View Current Forecast page or from a forecast snapshot.

To print forecast data

1. Go to the Forecasting page.
For more information, see [Access the Forecasting Page](#).
2. Click the **Current Forecast** link to print data from the published forecast.
—Or—
Click the name of the forecast snapshot to print data from a snapshot of the forecast.
3. Click the **Print** button.

Create Forecast Snapshots

Snapshots are views of finalized/published forecasts. Multiple snapshots can exist at the same time. They are created by editing working snapshots, and then saving them as a final forecast and a snapshot. For detailed steps on editing a forecast, see [Edit Forecasts](#).

Attach Documents to Forecasts

Documents can be attached to published forecasts or to snapshots.

Tip

In IE10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise™.

To attach documents to forecasts

1. Go to the Forecasting page.
For more information, see [Access the Forecasting Page](#).
2. Click the **Current Forecast** link to attach files to the published forecast.

—Or—

Click the name of the forecast snapshot to attach files to a snapshot of the forecast.

3. Click the **Documents** tab.
4. Click **Attach Documents**.
5. In the Select Attachment Method section, select your method of attachment.
6. Click **Browse For Files...**
7. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
8. If you are attaching files from e-Builder, go to the next step.

—Or—

If you are uploading files from your computer, in the Select an e-Builder Destination folder field, click **Browse**.

9. Search for and select the e-Builder destination folder.
10. Click **Attach Selected**.

Attach Forms to Forecasts

Forms can be attached to published forecasts or to snapshots.

To attach forms to forecasts

1. Go to the Forecasting page.
For more information, see [Access the Forecasting Page](#).
2. Click the **Current Forecast** link to attach forms to the published forecast.

—Or—

Click the name of the forecast snapshot to attach forms to a snapshot of the forecast.

3. Click the **Forms** tab.
4. Click **Attached Forms**.
The Attach Forms from [Project Name] filter displays.
5. Filter for the forms you want to see.
Results display in the table below.
6. Select the check box next to the form(s) you want to attach.
7. Click **Attach**.

Attach Processes to Forecasts

Processes can be attached to published forecasts or to snapshots.

To attach processes to forecasts

1. Go to the Forecasting page.
For more information, see [Access the Forecasting Page](#).

2. Click the **Current Forecast** link to attach processes to the published forecast.
—Or—
Click the name of the forecast snapshot to attach processes to a snapshot of the forecast.
3. Click the **Processes** tab.
4. Click **Attached Processes**.
The Attach Processes from [Project Name] filter displays.
5. Filter for the processes you want to see.
Results display in the table below.
6. Select the check box next to the process(es) you want to attach.
7. Click **Attach**.

Forecasting Page Overview

The Forecasting page is the first to display when accessing the Forecasts entity. After forecasts have been created, this page provides an overview of the following sections:

- Current forecasts- those saved as final drafts
- Working forecasts - those in edit mode
- Forecast snapshots- those saved as final versions and made into snapshots for easy retrieval and access later on.

Fields and Buttons

The fields and buttons located on this page are:

- **Forecasts:** This section lists and provides information on Current Forecasts and Working Forecasts.
- **Forecast Snapshots:** This table lists all saved snapshots. Forecast snapshots are all finalized forecasts that are no longer in use. When current forecasts are saved as final drafts, users have the option of saving them as a snapshot for historical record keeping. Click the **Rename** link to rename the forecast snapshot. Click the forecast name to access the snapshot.
- **Current Forecast:** Current Forecast is the most recent finalized forecast that is reflected in the Cost Summary and reports. After you finalize a working forecast it automatically becomes the new current forecast. If a current forecast existed prior to finalizing the working forecast, it can be saved as a Snapshot for historical record keeping.

Click this link to open the View Current Forecast page to view details or take any of the following actions:

- Print Current Forecast
- Attach Documents to Forecasts
- Attach Forms to Forecasts
- **Working Forecast:** The Working Forecast is the forecast currently being worked on, in edit mode and has not been finalized (or published). As long as you continue to work on it and save it as a draft, it will continue to be the working forecast, so that you can save your work as you go. There can only be one working forecast at a time. A robust feature of the Working Forecast functionality is that it allows

administrators to do "what if" scenarios. You can forecast item amounts, add a new forecast items to different account codes, or create different combinations to see the potential impact of changes before you undertake the work and truly realize the costs. If working forecast does not exist and you want to create one, click the **Edit Forecast** button. Once selected, e-Builder will start a new working forecast from the Current Forecast (if one exists). For more information on working with forecasts, see the following: Create a Forecast, Edit Forecasts. Click this link to open the Edit Forecast page and continue working on this draft.

- **Budget:** This column either displays the current or projected budget, as determined by your e-Builder Administrator while configuring the forecast settings. A description of each is provided below:
 - **Current Budget:** This is the approved original budget and all approved budget changes.
 - **Projected Budget:** This total includes the original budget amount plus all pending, projected, and approved budget changes.
- **Current Commitments:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows: (approved commitment changes) + (original commitments) + (approved general invoices).

Note: This field may or may not display depending on the setup options. To locate this setting, see Forecasting Settings Page Overview.

- **Projected Commitments:** This total is the sum of current commitments, pending commitments, pending commitment changes and projected commitments.

Note: When cost items are pending or projected, a vendor is identified. These items are part of your overall forecast.

- **Actuals Approved:** Displays the amount of approved invoices.

Note: This field may or may not display depending on the setup options. To locate this setting, see Forecasting Settings Page Overview.

- **Allocated Forecast:** Displays the total sum of all forecast dollars entered for all budget line items.
- **Unallocated Forecast:** Displays the amount that makes up the current budget, minus projected commitments, minus forecasted commitments. This column holds the forecasted expenditures that are not yet tracked in a commitment. Some organizations call this column 'To Be Bought'.
- **Estimate at Completion:** This column is equal to the current budget initially and then reflects real life circumstances (allocated forecasts) once the forecast is entered. This is the total sum of projected commitments + forecasted commitments + unallocated reserve.
- **Forecasted Over/ Under:** Displays the forecasted over/ under, which is the difference between the estimate at completion and the current budget. If the value is positive it means the project is currently over budget. If the value is negative, then you are projected to meet or beat your budget.
- **Name:** Displays the name of the snapshot. A snapshot is created once you finalize a working forecast. The current forecast becomes the snapshot and the working forecast that is finalized becomes the current forecast.
- **Date:** Displays the date the snapshot was created.

Add or Edit Forecast Page

The Add/ Edit Forecast page allows you to create a new forecast or modify an existing draft. A detailed description of the fields and buttons located on this page is provided in the table below.

Note: When accessing Forecasts for the first time there are no forecasts created. By default the Forecasted Over/ Under is calculated as 0 for each budget line item and the Estimate At Completion is equal to the approved budget because your approved budget is your forecast.

Fields and Buttons

The fields and buttons located on this page are:

- **Save Draft:** Click this button to save your work but not finalize (or publish) the forecast.
- **Save Final:** Click this button to publish the forecast. Final forecasts become the current forecast on the Forecasting page. Current forecast data is reflected on the project's cost summary (considering these columns are included in the Cost Summary layout; for more information on customizing cost summary layouts, see Add Cost Summary Layouts) and reports, and will be available for others to view.
- **Cancel:** Click this button to cancel any edits you've made. All unsaved changes will be lost.

Forecast Details

Administrators are able to enter instructions for users that would display in this field. For more information on this setting, see Forecasting Settings Page Overview.

- **Project:** This field displays the project name.
- **Name:** By default, Forecast created on [present date and time] displays as the forecast name, but this name can be changed.
- **Description:** Enter a description for the forecast in this field. This description will display on the View Current Forecast page for users to reference.

Forecast Tab

- **Expand/Collapse All (Toggle Hyperlink):** Click the Collapse All link to collapse all the budget line items to display just the cost summary dollars. Click the Expand All link to display the cost summary dollars and each forecast item associated with the line items.

Tip

Click the Collapse All link after entering all your forecast items to see the bottom line dollar amount.

- **Group By (drop-down arrow):** Click drop down menu to group the line items by different segmentation.

Note: If your account code structure does not display more than one grouping, there will not be any additional Group By options. The Forecast utility has two modes: Detail Mode and Adjustment Mode.

- **Switch to Adjustment Mode/ Detail Mode (Toggle Button):** Click this button to toggle back and forth between Detail and Adjustment Modes. You may or may not be able to switch between Detailed and Adjustment modes, depending on account settings; for more information, see

Forecasting Settings.

- **Detail Mode:** For each budget line item, a list of forecasted commitments is recorded. Each item represents a future commitment that is not represented as a commitment or commitment change within the cost module. In addition to the description, assumption and forecast amounts there are check boxes for each forecast item that indicates whether or not the item is captured in the budget or in commitments.
- **Adjustment Mode:** Each time the forecast is updated in adjustment mode, the cost manager is evaluating, on a budget line item basis, the unallocated against the amount of work left on the job and adjusting the reserve up or down as necessary.
- **Forecast Data Table:** Each account code can have one or more forecast items associated with it.
 - **Description:** Enter a description of the forecast item in this field.
 - **Assumption:** Enter an assumption for the forecast item in this field.
 - **Forecasted Commitment:** (Detailed Mode) This field is required. Enter the forecasted commitment amount in this field. Commas are automatically added to amounts when you click the Add link.
 - **Budgeted:** (Detailed Mode) By default, this check box is selected if the amount that you are forecasting is included in the budget amount. If you do not want the forecast item you are adding to be included in the budget amount, you should clear this check box so that the forecasted over/(under) will adjust to show that you are over the budget by this amount.
 - **Committed:** (Detailed Mode) By default, the "Committed" check box is unchecked and any amount entered for a Forecast entry will be reflected in the "Forecasted Commitment" value for the Budget Item. If a commitment is subsequently created in the Cost module, the "Projected Commitment" value will reflect that commitment's value. At that time, a manual step needs to be completed by checking the "Committed" checkbox. Once this is checked, the value will be removed from the "Forecasted Commitment" value to avoid adding the Forecast entry amount to the real "Projected Commitment" value.
 - **Delete:** (Detailed Mode) Click this link to remove the forecast item.
 - **Net Adjustment:** (Adjustment Mode) This field displays the net amount adjusted.
- **Account Code:** Displays the account code or budget line item code.
- **Description:** Displays the description of the account code.
- **Calculate Unallocated Reserve:** If this check box is selected, e-Builder will automatically calculate the Unallocated Reserve. The formula is as follows:

Unallocated Reserve = the Maximum of 0.00 OR (Current Budget + Σ (Detail Items that are not Budgeted) - Projected Commitments - Σ (Detail Items that are not Committed)).

Note: When the budget is first approved, this check box is checked so that the Forecasted Over/Under is -0-. If unchecked then the Unallocated Reserve column will be -0- and the Forecasted Over/Under will be calculated based on the sum of (Projected Commitments + the Forecasted Commitments). If you are in Detail Mode, it is recommended that you uncheck the Use Unallocated Reserve check box when you are ready to enter your complete forecast for that line item.

However, if you are in Adjustment Mode, you would always have this check box selected because you are simply adjusting up and down the Estimate at Completion. In these cases you want the Forecasted Over/ under to start at -0-.

- **Budget:** Displays the current budget or projected budget based on the account setting. Typically, a budget is the likely expenditure/ receipt of revenue.

Note: The use of Current Budget or Projected Budget is directly dependent on the account setting for forecasting in the **Calculate Forecasted Over/ (Under) Using** field on the Forecasting Settings page.

- **Current Commitments:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows:

Current Commitments = (approved commitment changes) + (original commitments) + (approved general invoices).

- **Projected Commitments:** Displays the projected commitments. The formula is as follows:

Projected Commitments = the sum of Current Commitments + Pending commitment Changes + Projected commitment Changes + Pending Commitments.

Note: When cost items are pending or projected, a vendor is identified. These items are part of your overall forecast.

- **Actuals Approved:** Displays the dollar amount of approved invoices. This figure will assist you in determining risk. If a line item is almost completely paid it has less risk.
- **Forecasted Commitments:** Displays the list of specific scope items with Forecasted Commitment amounts. Note that the figure includes only those forecasted commitments with the Committed check box cleared. If your forecasted commitment is more than your budget and the unallocated reserve check box is selected, the over/(under) will be the difference of the two. For example, if your budget is \$10 and your forecasted commitments is \$20, your over/(under) will be \$10.
- **Unallocated Reserve:** Displays the dollar amount of unallocated reserve. This figure indicates the forecasted expenditures that are not yet tracked in a commitment. The formula is as follows:

Unallocated Reserve = the Maximum of 0.00 OR (Current Budget + Σ (Detail Items that are not Budgeted) - Projected Commitments - Σ (Detail Items that are not Committed)).

Note: For every detail (forecast) item that you enter under a budget item, you can check the "Budgeted" and/ or "Committed" check boxes to indicate that those detail items are either "budgeted" (when checked) or "committed" (when checked). The formula therefore adjusts the unallocated reserve for each budget item upwards by the sum of detail items that have "Budgeted" box unchecked, and adjusts the unallocated reserve downwards by the sum of detail items that have the "Committed" box unchecked.

- **Estimate at Completion (EAC):** Displays the Estimate at Completion, which equals the sum [Projected Commitments + Forecasted Commitments + Unallocated Reserve]. This column is equal to the Current Budget or Projected Budget (initially) and then reflects real life circumstances (Forecasted Commitments) once the forecast is entered.

- **Forecasted Over/(Under):** Displays the forecasted Over/(Under), which equals the difference between the Estimate at Completion and the Current Budget or Projected Budget. So if the value is positive, if the project ended right at this given point in time, it would be over budget; if -0- or negative, you would meet or beat your targets.
- **Documents Tab:** This tab displays any files that have been attached to the forecast. From here you can also attach or remove documents to the forecast.
- **Forms Tab:** This tab displays any forms that have been attached to the forecast. From here you can also attach or remove forms to the forecast.
- **Processes Tab:** This tab displays any processes that have been attached to the forecast. From here you can also attach or remove processes to the forecast.

View Current Forecast Page

This page displays when the Current Commitment link is selected on the Forecasting page. This is the view of the current published forecast data. If forecast related columns are configured on a cost summary layout, these figures will also be available in the project's cost summary. For more information on configuring cost summary columns, see Add Cost Summary Layouts. The following actions can be taken from this page:

- Print Current Forecast
- Attach Documents to Forecasts
- Attach Forms to Forecasts

Fields and Buttons

The fields and buttons located on this page are:

- **Print:** Click this button to print the forecast.

Forecast Details

- **Project:** This field displays the name of the project this forecast belongs to.
- **Name:** This field displays the name of the forecast.
- **Description:** This field displays the description for the forecast as entered by the user.
- **Last Modified:** This field displays the date this forecast was last modified and by whom.
- **Forecasted Commitments:** This field displays the total sum of forecasted commitments.
- **Estimate At Completion:** This field displays the estimate at completion, which equals the sum [Projected Commitments + Forecasted Commitments + Unallocated Reserve]. This column is equal to the Current or Projected Budget (initially) and then reflects real life circumstances (Forecasted Commitments) once the forecast is entered.
- **Unallocated Reserve:** Displays the dollar amount of unallocated reserve. This figure indicates the forecasted expenditures that are not yet tracked in a commitment.

The formula is as follows:

Unallocated Reserve = the Maximum of 0.00 OR (Current Budget + Σ (Detail Items that are not Budgeted) - Projected Commitments - Σ (Detail Items that are not Committed)).

Note: For every detail (forecast) item that you enter under a budget item, you can check the “Budgeted” and/ or “Committed” check boxes to indicate that those detail items are either “budgeted” (when checked) or “committed” (when checked). The formula therefore adjusts the unallocated reserve for each budget item upwards by the sum of detail items that have “Budgeted” box unchecked, and adjusts the unallocated reserve downwards by the sum of detail items that have the “Committed” box unchecked.

- **Forecasted Over/(Under):** Displays the amount you forecast is above or under your budget. If the value is positive it means the project is currently over budget. If the value is negative, then you are projected to meet or beat your budget.

Forecast Tab

- **Expand/Collapse All (Toggle Hyperlink):** Click the Collapse All link to collapse all the budget line items to display just the cost summary dollars. Click the Expand All link to display the cost summary dollars and each forecast item associated with the line items.

Tip

Click the Collapse All link after entering all your forecast items to see the bottom line dollar amount.

- **Group By (drop-down arrow):** Click drop down menu to group the line items by different segmentation.

Note: If your account code structure does not display more than one grouping, there will not be any additional Group By options. The Forecast utility has two modes: Detail Mode and Adjustment Mode.

- **Switch to Adjustment Mode/ Detail Mode (Toggle Button):** Click this button to toggle back and forth between Detail and Adjustment Modes. You may or may not be able to switch between Detailed and Adjustment modes, depending on account settings; for more information, see Forecasting Settings.
 - **Detail Mode:** For each budget line item, a list of forecasted commitments is recorded. Each item represents a future commitment that is not represented as a commitment or commitment change within the cost module. In addition to the description, assumption and forecast amounts there are check boxes for each forecast item that indicates whether or not the item is captured in the budget or in commitments.
 - **Adjustment Mode:** Each time the forecast is updated in adjustment mode, the cost manager is evaluating, on a budget line item basis, the unallocated against the amount of work left on the job and adjusting the reserve up or down as necessary.
- **Account Code:** Displays the account code or budget line item code.
- **Description:** Displays the description of the account code.
- **Budget:** Displays the current or projected budget. The current budget equals the original (approved) budget + approved budget changes. The projected budget equals the original (approved) budget + all pending, projected, and approved budget changes. Typically, a budget is the likely expenditure/ receipt of revenue.

- **Current Commitments:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows:

Current Commitments = (approved commitment changes) + (original commitments) + (approved general invoices).

- **Projected Commitments:** This total is the sum of current commitments, pending commitments, pending commitment changes and projected commitments.

Note: When cost items are pending or projected, a vendor is identified. These items are part of your overall forecast.

- **Actuals Approved:** Depending on account settings, this column may or may not display. This is the amount of all approved invoices.
- **Forecasted Commitments:** Displays the list of specific scope items with Forecasted Commitment amounts. Note that the figure includes only those forecasted commitments with the Committed check box cleared. If your forecasted commitment is more than your budget and the unallocated reserve check box is selected, the over/(under) will be the difference of the two. For example, if your budget is \$10 and your forecasted commitments is \$20, your over/(under) will be \$10.
- **Unallocated Reserve:** Displays the dollar amount of unallocated reserve. This figure indicates the forecasted expenditures that are not yet tracked in a commitment. The formula is as follows:

Unallocated Reserve = the Maximum of 0.00 OR (Current Budget + Σ (Detail Items that are not Budgeted) - Projected Commitments - Σ (Detail Items that are not Committed)).

Note: For every detail (forecast) item that you enter under a budget item, you can check the “Budgeted” and/ or “Committed” check boxes to indicate that those detail items are either “budgeted” (when checked) or “committed” (when checked). The formula therefore adjusts the unallocated reserve for each budget item upwards by the sum of detail items that have “Budgeted” box unchecked, and adjusts the unallocated reserve downwards by the sum of detail items that have the “Committed” box unchecked.

- **Estimate at Completion (EAC):** Displays the Estimate at Completion, which equals the sum [Projected Commitments + Forecasted Commitments + Unallocated Reserve]. This column is equal to the Current or Projected Budget (initially) and then reflects real life circumstances (Forecasted Commitments) once the forecast is entered.
- **Forecasted Over/(Under):** Displays the forecasted Over/(Under), which equals the difference between the Estimate at Completion and the Current or Projected Budget. So if the value is positive, if the project ended right at this given point in time, it would be over budget; if -0- or negative, you would meet or beat your targets.
- **Documents Tab:** This tab displays any files that have been attached to the forecast. From here you can also attach or remove documents from the forecast.
- **Forms Tab:** This tab displays any forms that have been attached to the forecast. From here you can also attach or remove forms from the forecast.
- **Processes Tab:** This tab displays any processes that have been attached to the forecast. From here you can also attach or remove processes from the forecast.

Cash Flow

The Cash Flow cost entity in e-Builder is used to project the amount of money that will be expended each month in the remaining life of a project. Setting up the cash flow entails establishing industry standard cash flow curves for each of your budget line items (Manual, Bell, Inverse Bell, Linear, S and Inverse S Curves). The cash flow module is optimized by incorporating the project's schedule, allowing you to link curves to the overall schedule or to tasks within the schedule. You can also link cash flow curves to the overall project, for expenditures that do not involve the schedule. The cash flow is viewed and calculated on a month to month basis. This is a great financial planning tool that helps you anticipate how much money will be needed for each budget line item in the approaching months.

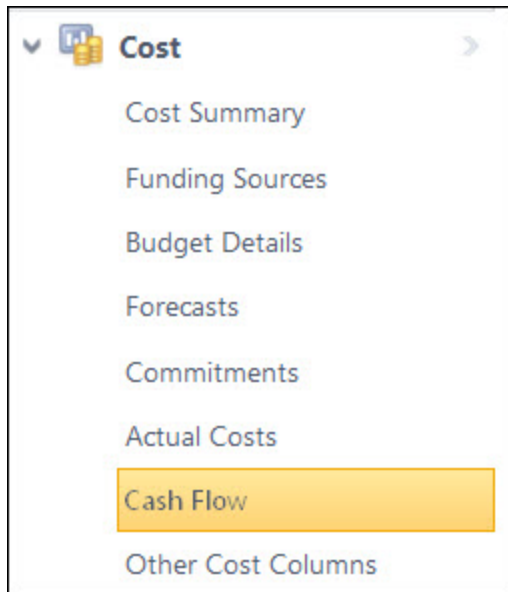
The following topics will assist you while working with cash flows:

- Access the Project Cash Flow Page
- Set up Cash Flow
- Update Cash Flow
- View Current Cash Flow
- Print the Current Cash Flow
- Project Cash Flow Page Overview

Access the Project Cash Flow Page

To access the cash flow page

1. Go to the Project Cost Summary page.
For more information, see Access the Project Cost Summary Page.
2. Click the **Cash Flow** link located in the left navigation bar.



Set up Cash Flow

Setting up cash flow is the first step to utilizing this project feature. In setting up the cash flow you will establish cash flow curves for each of your budget line items. You might return to this page if you choose to make changes to your cash flow curves.

To set up the cash flow

1. Go to the Project Cash Flow page.
For more information see Access the Project Cash Flow Page.
2. Click **Setup Cash Flow**.
The Setup Cash Flow page displays.
3. Click the **Cash Flow Curve** drop-down arrow to select a curve for each respective budget line item.

Tip

To apply the same selection for Cash Flow Curve, Schedule Link Type and Payment Lag to all budget line items, make the selection in the first available drop-down arrow/field, and then click the Apply To All link.

Cash Flow Curve	Schedule Link Type	Payment Lag (In Days)
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Apply To All"/>	<input type="button" value="Apply To All"/>	<input type="button" value="Apply To All"/>

4. Click the **Schedule Link Type** drop-down arrow to select a component you'd like to link the cash flow curve to for each respective budget line item. Select from the following: Link To Tasks, Link To Project, Link To Schedule.
For more information on the fields and buttons located on this page, see Setup Cash Flow Page Overview.
5. If you choose Link to Tasks for any of the line items, click the **Task [#]** drop-down arrow to select a task to link the cash flow curve to.
6. In the **Payment Lag (In Days)** field, enter the number days to extend the cash flow past its completion for an accurate view of cost data after payments have been processed.
Note: Payment lag works only for cash flows based on paid invoices.
7. Click **Save**.

Update Cash Flow

Updating the cash flow allows you to see new fund trajectories for upcoming months based on new financial developments and established cash flow curves. The cash flow should be updated periodically, usually on a monthly basis. Cash flow is updated per budget line item for each remaining month of the project life cycle according to the measure by which the cash flow is linked to, such as the project start and target dates, the schedule, or task. Once the cash flow has been set up for a project, you can update it at any time.

Important: The cutoff for any updates to reflect in the current month is 11:59 PM UTC (Coordinated Universal Time) on the last day of the month regardless of your individual time zone setting.

To update the cash flow

1. Go to the Project Cash Flow page.
For instructions, see [Access the Project Cash Flow Page](#).
2. Click **Update Cash Flow**.
The Update Cash Flow page displays.
3. Enter the amounts that are projected to be spent for select or all subsequent months.
4. To view the cash flow distribution based on the amounts you've entered, click **Recalculate All**.
5. To view the cash flow distribution for specific line items, select the check box next to those line items and click **Recalculate Selected**.

Tip

To see the actual cash flow curve while making your updates, click the icon in the **Graph** column. On the popup window that displays, you can also define custom curves.


6. Click **Save**.

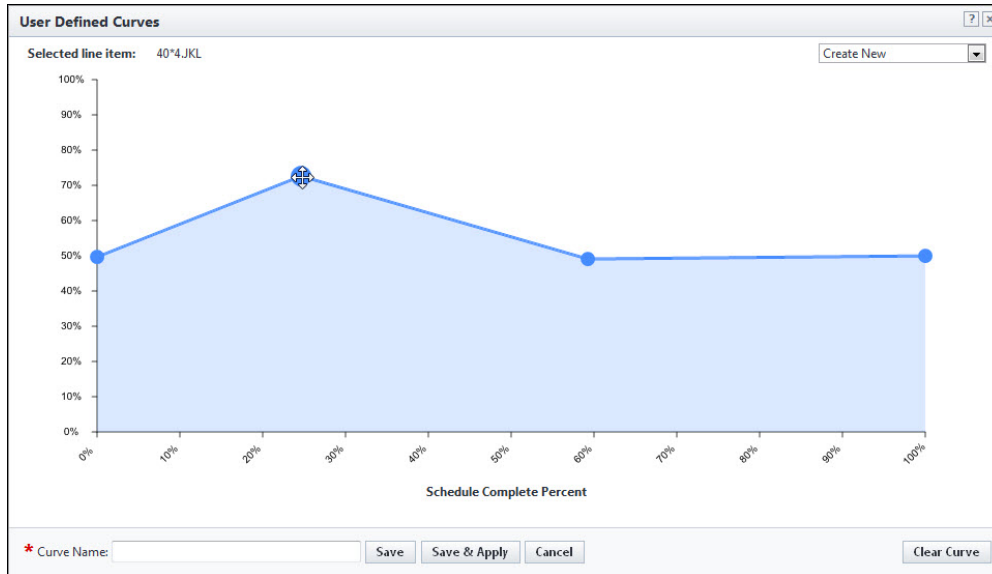
Note: For a description of each field on this page, see [Update Cash Flow Page Overview](#).

Define Custom Cash Flow Curves

While updating your cash flow, you can choose a built-in curve or define your own. Creating your own curve gives you the ability to determine exactly how funds will be dispersed for the remainder of the project.

To define custom cash flow curves

1. Go to the Project Cash Flow page.
For instructions, see [Access the Project Cash Flow Page](#).
2. Click **Update Cash Flow**.
The Update Cash Flow page is displayed.
3. Click the icon in the **Graph** column .
The Cash Flow for [Line Item Description] window displays.
4. Click **Define Curve**.
5. Double-click an area on the line to create a new point.



6. Click and drag any of the points to move them.
7. In the **Curve Name** field, enter a name for the new curve.
8. Click **Save** to save the curve to the list of curves in the drop-down menu.
9. Click **Save & Apply** to save the curve to the list of curves and also apply it to the selected line item.

View Current Cash Flow

If at least one cash flow has been created, it can be viewed from the Project Cash Flow page.

To view the current cash flow:

1. Go to the Project Cash Flow page.
For more information, see [Access the Project Cash Flow Page](#).
2. Click the link of the cash flow name, next to the label: **Current Cash Flow**.

Print the Current Cash Flow

You may want to print the cash flow for distribution purposes. The current cash flow can be printed from the View Cash Flow page

To print the current cash flow

1. Go to the Project Cash Flow page.
For more information, see [Access the Project Cash Flow Page](#).
2. Click the link of the cash flow name, next to the label: **Current Cash Flow**.
The View Cash Flow Page displays.
3. Click **Print**.

Add Notes

The Notes tab allows users to quickly add notes of importance. Notes allow all team members who have the permission to see the communication. For each note entered, the first and last name and company name of the user will be displayed along with the date. Contained within the tab, in parenthesis, e-Builder displays the total number of notes created.

To add notes

1. On the **Notes** tab, click **Add**.
The Add Note page is displayed.
2. Enter the note in the **Note** field.
3. If the **Private** check box is available, you can select it to hide your note from other team members.
4. Click **Save**.

Attach Documents to Cash Flow

You have the ability to view, as well as attach any supporting documents associated with the cash flow. Once attached, other users can view and download these files.

Tip

In IE10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise™.

To attach documents

1. Go to the Project Cash Flow page.
For more information, see [Access the Project Cash Flow Page](#).
2. Click the **Current Cash Flow** link to open the View Cash Flow page.
3. Click the **Documents** tab.
4. Click **Attach Documents**.
The Attach Documents dialog box displays.
5. In the **Select Attachment Method** section, select your method of attachment.
6. Click **Browse For Files...**
7. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
8. If you are attaching files from e-Builder, go to the next step.
—Or—
If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.
9. Search for and select the e-Builder destination folder.
10. Click **Attach Selected**.

Attach Forms to Cash Flow

You have the ability to attach and remove attached forms from a cash flow in the event the form was attached in error.

Note: Forms are permission driven. If a user does not have the permission level to view the form in the Forms module, they will not be able to view the form attached here.

To attach a form to the cash flow

1. Go to the Project Cash Flow page.
For more information, see [Access the Project Cash Flow Page](#).
2. Click the **Current Cash Flow** link to open the View Cash Flow page.
3. Click the **Attached Forms** tab.
4. Click **Attached Forms**.
The Attach Forms from [Project Name] filter displays.
5. Filter for the forms you want to see.
Results display in the table below.
6. Select the check box next to the form(s) you want to attach.
7. Click **Attach**.

Attach Processes to Cash Flow

To attach processes to the cash flow

1. Go to the Project Cash Flow page.
For more information, see [Access the Project Cash Flow Page](#).
2. Click the **Current Cash Flow** link to open the View Cash Flow page.
3. Click the **Processes** tab.
4. Click **Attach Processes**.
The Attach Processes from [Project Name] filter displays.
5. Filter for the processes you want to see.
Results display in the table below.
6. Select the check box next to the process(es) you want to attach.
7. Click **Attach**.

Project Cash Flow Page Overview

The Project Cash Flow page is the first to display when accessing Cash Flows. From here you can setup your cash flow, view the existing current cash flow and take steps toward making updates.

Fields and Buttons

The fields and buttons located on this page are:

- **Previous cash Flows:** Click this button to open the Previous Cash Flow page and view a list of all previous cash flows.
- **Setup Cash Flow:** Click this button to open the Setup Cash Flow page and set cash flow curves or each of your budget line items. Setting up the cash flow is the first step in using this function.
- **Update Cash Flow:** Click this button to open the Update Cash Flow page and recalculate the cash flow based on different cost entities. The cash flow should be updated monthly, so you project how much money will be needed in the coming months.
- **Cash Flow Summary:**
 - **Project** This field displays the name of the project that you're currently in.
 - **Current Cash Flow** This field displays the name of the current cash flow. Click this link to open the View Cash Flow page to take further action on the cash flow.
 - **Description** This field displays the description of the current cash flow.
- **Quick Cost Summary:** The Quick Cost Summary offers a more condensed, yet comprehensive view of the budget, providing current status of the original budget, current commitments and invoices paid to date.
 - **Current Budget:** This is the approved original budget and all approved budget changes.
 - **Current Commitments:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows: (approved commitment changes) + (original commitments) + (approved general invoices).
 - **Actuals Approved:** This is the amount of all approved invoices.
 - **Actual Cost to Complete:** This is the total invoice amount needed to fulfill all commitments. The formula is as follows: (projected commitments) (actuals approved).
 - **Available Funds:** This is the total amount of funds available in your funding sources.

Note: Funds are not depleted from the funding source until invoices have been approved. This total does not take into account invoices marked received.
 - **Forecasted Over/ (Under):** This figure represents an amount above or under the forecasted budget. This total is the difference between the estimate at completion and the current budget. The formula is as follows: (estimate at completion) (current budget). For more information on the forecasting utility, see Forecasting.
- **Current Cash Flow Table:**
 - **Group By:** Groups the items by account code or as a list of line items.
 - **Collapse All:** Displays the subtotals under each grouping. Available only when grouped by account code.
 - **Expand All:** Displays all the line items under each grouping. Available only when grouped by account code.
 - **Show all previous months:** Select this check box to display cash flow figures for all previous months of the project. All earlier months reflect the actual costs entered for the project in those months.
 - **Line Item:** This is the budget line item number.

- **Description:** This is the description of the budget line item.
- **Projected Budget:** This total includes the original budget amount plus all pending, projected, and approved budget changes.
- **Projected Commitments:** This total is the sum of current commitments, pending commitments, pending commitment changes and projected commitments.
- **Estimate at Completion:** This is the amount that is needed to complete the project based on the current budget. The formula is as follows: (projected commitments) + (forecasted commitments) + (unallocated reserve).
- **Actuals To Date:** This is the total amount of paid or approved invoices to date.

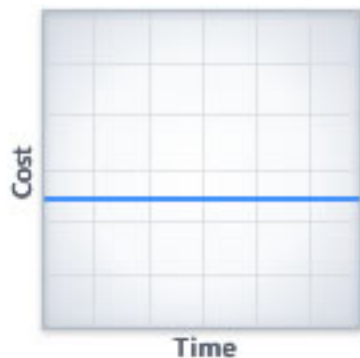
Setup Cash Flow Page

This page allows you to configure your cash flow. By selecting a cash flow curve you can more easily allocate the remaining money on a project. Depending on the budget line item and the nature of the task, it may be best to use different curves on the different line items in the budget.

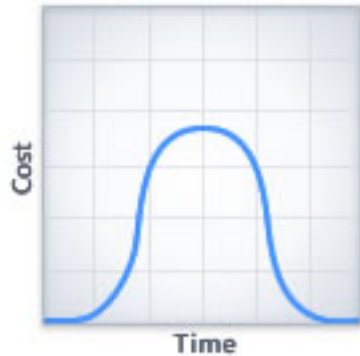
Fields and Buttons

A detailed description of the fields and buttons located on this page is provided below:

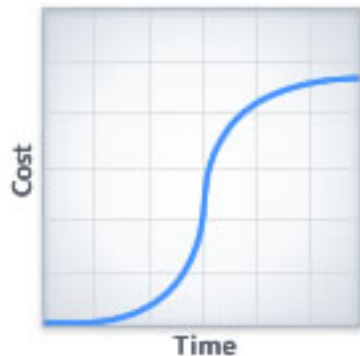
- **Select Template to Apply:** If cash flow templates have been created for this account, this drop-down arrow displays for you to select a template to apply to the cash flow. Cash flow templates are created by your e-Builder account administrator. For more information, see Cash Flow Templates.
- **Save:** Click this button to save changes.
- **Cancel:** Click this button to cancel any changes you have made. All unsaved changes will be lost.
- **Cash Flow Curve:** Click this drop-down arrow to select a cash flow curve to apply to the budget line item. A description of each cash flow curve is provided below:
 - **Manual:** Manual is the default cash flow curve selection and it allows you to manually input the amount of cash expected to be used in each month. This selection might be a good fit for permits, for example, which is a one-time-payment expense.
 - **Linear:** The linear curve allows you to allocate an equal amount of money to each month. A linear curve might be applied to the support staff on a project, which may be paid the same amount each month throughout the duration of the project.



- **Bell Curve:** The bell curve allocates a small amount of money in the beginning and increases each month until it reaches a peak and then declines at the same rate as it increased. If this distribution is displayed on a graph it would be shaped like a bell. The Bell curve distribution is often used for construction line items in the budget, which have little costs in the beginning of a project, followed by sharp increases and then sharp decreases as construction is completed.

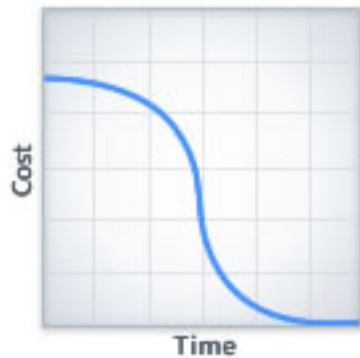


- **S Curve:** The S curve allocation is flatter at the beginning and end and steeper in the middle and end of its duration. The beginning represents a slow, deliberate but accelerating start, while the end represents a deceleration as the work runs out. For example, a budget line item for furniture, fixtures, and equipment would follow this curve as expenses start low and increase steadily.



- **Inverse S Curve:** The inverse S curve is the reverse of the S Curve. It allocates a large amount of funds in the beginning and then rapidly declines. For example, design fees on a project will typically be higher at the start of a project and then decrease as design is con-

cluded.



- **Schedule Link Type:** The schedule link type that is selected determines the months in which the cash is allocated for the budget line item. The link type works in tandem with the cash flow curve to project when cash will be needed throughout the project. A description of each link type is provided below:
 - **Link to Schedule:** The Link to Schedule option links the cash flow curve you select to the overall Start and Finish dates of the project schedule. This option is used when a budget line item will utilize cash for the entire duration of the project schedule.
 - **Link to Tasks:** The Link to Tasks option links the cash flow curve you select to the Start and Finish dates of one or two tasks in the schedule. This option is used when a budget line item will only utilize cash during part of the project. For example, a line item in the budget for construction may only be utilized during the construction phase of the project.
 - **Link to Project:** The Link to Project option links the cash flow curve you select to the Start and Target dates of the project details. This option is used when a budget line item will utilize cash for the entire duration of the project, which may not correspond with the schedule.
- **Task 1/2:** These fields display if Link To Tasks was selected in the Schedule Link Type drop-down arrow. These drop-down arrows allow you to choose a task in your schedule to link the cash flow curve to.
- **Payment Lag (In Days):** The payment lag refers to the amount of days you wish to extend your cash flow in order to account for payments. This setting allows you to track when checks are written and out the door. Depending on how your cash flow is setup, the payment lag will add additional days to the end of the project (if the cash flow is linked to the project start and end dates), the end of the schedule (if the cash flow is linked to the schedule), or to the end of the task (if the cash flow is linked to a particular task).

Update Cash Flow Page

The View Cash Flow page provides details of the current or previous cash flows. From here you can make changes to the way cash flow curves are setup, update you cash flow by allocating funds and you can also make the cash flow you are viewing the baseline for the project.

Important: The cutoff for any updates to reflect in the current month is 11:59 PM UTC (Coordinated Universal Time) on the last day of the month regardless of your individual time zone setting.

The fields and buttons on this page are:

Update Cash Flow - Buttons

- **Save:** Click this button to save changes.
- **Cancel:** Click this button to cancel any changes you have made. All unsaved changes will be lost.

Cash Flow Summary - Fields

- **Project:** This field displays the project name.
- **Current Cash Flow:** This field displays the title of the current cash flow.
- **Description:** Enter a description for the cash flow in this field.

Cash Flow Tab - Fields

- **Forecast cash flow using (Filter):** You must choose the amounts by which to base your cash flow projections. The first drop-down menu includes the following options:
 - **Projected Budget:** This option does not take your commitments into account. The Project Budget is the original budget amount plus all pending, projected, and approved budget changes.
 - **Projected Commitments:** This is the sum of your current commitments, pending commitments, pending commitment changes and projected commitments.
 - **Estimate at Completion:** This option is only available if you are using the Forecasting tool-set. In which case, this is the recommended option. The Estimate at Completion is equal to the current budget + projected commitments + forecasted commitments.

These options are made in combination with any of the following invoice status options:

- **Actuals Received:** This is the amount of all approved invoices as well as those marked received. Received is a status that may or may not be used, but once invoices have been approved, they will automatically display in this column whether they were marked received or not. In a process, this status might automatically be applied once the process enters a specific step.
- **Actuals Approved:** This is the amount of all approved invoices. In a process, this status is automatically be applied once the process enters a specific step.
- **Actuals Paid:** Paid is a status that may or may not be used. In a process, this status might automatically be applied once the process enters a specific step.
- **Net Actuals Approved:** This is the total amount of approved invoices less retainage held (retainage not yet paid).
- **Net Actuals Paid:** This is the amount of all invoices that have been paid, not including retainage. The formula is as follows: paid invoices retainage held (retainage not yet paid).
- **Must allocate all funds in projections:** If this check box is selected you cannot save the cash flow until all funds are allocated. If you will not be allocating all funds on a line, you must uncheck this to save the cash flow.
- **Show all previous months:** Select this check box to see figures for all previous months display on the table below.

Note: Previous months are actuals that have been approved or paid (based on the forecast selection) during that month.

- **Group By:** Groups the items by account code or as a list of line items.
- **Collapse All:** Displays the subtotals under each grouping. Available only when grouped by account code.
- **Expand All:** Displays all the line items under each grouping. Available only when grouped by account code.
- **Export:** Click this button to export the figures currently displayed to an Excel® spreadsheet.

Note: The cash flow projections can be updated on the spreadsheet and imported back into e-Builder.

- **Import:** Click this button to import cash flow figures.

Note: The import spreadsheet must be the Excel® spreadsheet template that was exported. You cannot use a new workbook to import.

- **Recalculate Selected:** Click this button to reallocate funds based on cash flow curves that have been established for the selected budget line item. Funds in the remaining to be allocated column will be dispersed based on the specified months (based on the schedule link type).
- **Recalculate All:** For all budget line items using cash flow curves, pressing this button will automatically allocate the funds in the remaining to be allocated column for the specified months (based on the schedule link type).
- **Update Cash Flow Table:**
 - **Line Item:** Displays the budget line item number.
 - **Description:** Displays the description of the budget line item.
 - **Projected Budget:** Based on the forecast using this selection, this column displays either the projected budget, projected commitments or estimate at completion.
 - **Actuals To Date:** Based on the status selected in the forecast being used, this column displays either the actuals approved, actuals paid, net actuals approved or net actuals paid.
 - **Remaining To Be Allocated:** This column displays the amount of funds that remain in the budget to be allocated.
- **Custom Fields Tab:** If your account is using Cash Flow custom fields click this tab to update the field(s) as needed.

Previous Cash Flows Page

This page displays when the Previous Cash Flow button is selected on the main Project Cash Flow page and allows you to access a list of all previous cash flows.

Cash Flow Summary - Fields and Buttons

The fields and buttons on this page are:

- **Project:** This field displays the project name.
- **Current Cash Flow:** This field displays the title of the current cash flow.
- **Description:** Enter a description for the cash flow in this field.

- **Quick Cost Summary:** The Quick Cost Summary offers a more condensed, yet comprehensive view of the budget, providing current status of the original budget, current commitments and invoices paid to date.
 - **Current Budget:** This is the approved original budget and all approved budget changes.
 - **Current Commitments:** This is the amount of all approved commitment changes plus original commitments, and approved general invoices. The formula is as follows: (approved commitment changes) + (original commitments) + (approved general invoices).
 - **Actuals Approved:** This is the amount of all approved invoices.
 - **Actual Cost to Complete:** This is the total invoice amount needed to fulfill all commitments. The formula is as follows: (projected commitments) (actuals approved).
 - **Available Funds:** This is the total amount of funds available in your funding sources.

Note: Funds are not depleted from the funding source until invoices have been approved. This total does not take into account invoices marked received.
 - **Forecasted Over/ (Under):** This figure represents an amount above or under the forecasted budget. This total is the difference between the estimate at completion and the current budget. The formula is as follows: (estimate at completion) (current budget). For more information on the forecasting utility, see Forecasting.
- **Previous Cash Flows:**
 - **For Month:** This is the month of the previous cash flow. Click this link to open the View Cash Flow page for each respective month.
 - **Description** This is the description of the cash flow.
 - **Created By:** This is the name of the person the cash flow was created by.
 - **Date Created:** This is the date that the cash flow was created.
 - **Baseline:** This indicates whether the cash flow was used as a baseline for the project.

View Cash Flow Page

The View Cash Flow page provides details of the current or previous cash flows. From here you can make changes to the way cash flow curves are setup, update you cash flow by allocating funds and you can also make the cash flow you are viewing the baseline for the project. A detailed description of the fields and buttons located on this page is provided in the table below.

View Cash Flow Page - Buttons

- **Save Baseline:** Click this button to save the cash flow as the baseline.
- **Setup Cash Flow:** Click this button to open the Setup Cash Flow page and set cash flow curves or each of your budget line items. Setting up the cash flow is the first step in using this function.
- **Update Cash Flow:** Click this button to open the Update Cash Flow page and recalculate the cash flow based on different cost entities. The cash flow should be updated monthly, so you project how much money will be needed in the coming months. This button only appears for the current cash flow, and not for previous cash flows.
- **Cancel:** Click this button to cancel any changes you have made. All unsaved changes will be lost.

Cash Flow Summary - Fields

- **Project:** This field displays the project name.
- **Created By:** This field displays name of the person that the cash flow was created by.
- **Last Modified By:** This field displays the name of the person that the cash flow was last modified by.
- **Description:** This field displays the description of the cash flow.
- **Date Created:** This field displays the date that the cash flow was created.
- **Date Last Modified:** This field displays the date that the cash flow was last modified.
- **Baseline:** Yes or No is displayed in this field to indicate whether or not this cash flow is the project's baseline.

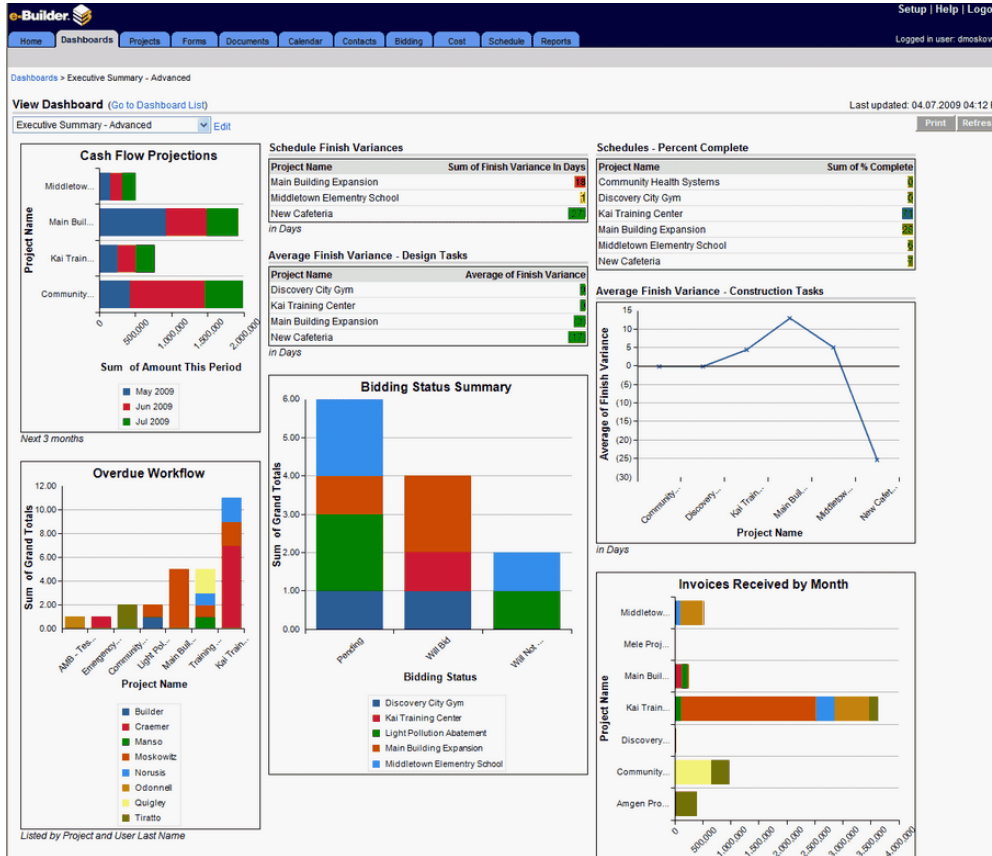
Cash Flow Tab - Fields

- **Show all previous months:** If this box is checked, the past month's cash usage will be displayed.
- **Export to Excel Icon:** Click this icon to export the cash flow to a Microsoft Excel® spreadsheet.
- **Cash Flow Table:**
 - **Line Item:** This column displays the budget line item number.
 - **Description:** This column displays the description of the budget line item.
 - **Projected Budget:** This column displays the projected budget amount.
 - **Projected Commitments:** This column displays the projected budget amount.
 - **Estimate at Completion:** This column displays the estimate at completion. It only appears if you have the Forecast utility enabled on your account. For more information, see Forecasting.
 - **Actuals To Date:** This column displays the amount of invoices entered to date.
 - **Remaining To Be Allocated:** This column displays the amount of funds that remain in the budget to be allocated.
- **Custom Fields Tab:** If your account is using Cash Flow custom fields click this tab to update the field(s) as needed.
- **Notes Tab:** Click this tab to add notes to the cash flow or view existing notes.
- **Documents Tab:** Click this tab to attach documents to the cash flow or view any existing documents that may already be attached. If you have the proper permissions you can also remove attached documents from this tab.
- **Forms Tab:** Click this tab to attach forms to the cash flow or view any existing forms that may already be attached. If you have the proper permissions you can also remove attached forms from this tab.
- **Processes Tab:** Click this tab to attach processes to the cash flow or view any existing forms that may already be attached. If you have the proper permissions you can also remove attached forms from this tab.

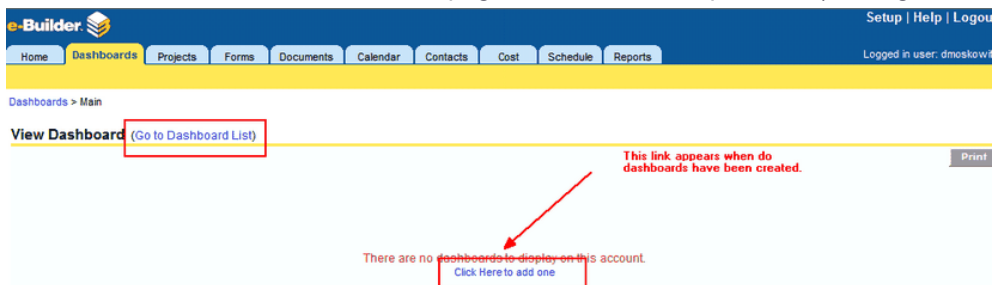
Dashboards

What Are Dashboards?

Dashboards are a graphical representation of reports. They present summary data from reports in a visual format. They are typically used to provide overviews of program or project statuses and metrics.



If no dashboards have been created on the account to which you have access, when you enter the dashboards module you will see the message there are no dashboards to display on this account. To create a dashboard, click the link in the middle of the page and follow the steps below (starting with step 2).



Creating a Dashboard

To create a dashboard, follow these steps

1. From the Dashboards tab, click the **Go To Dashboard List** link. A list of Dashboard Folders will be displayed.

2. Click **Add Dashboard**.

The Add Dashboard page will be displayed.

3. Enter the following information:

- **Title:** Enter a name for your dashboard.
- **Description:** Enter a description of the dashboard.
- **Dashboard Layout Style:** Select the Layout style that will determine the number of columns shown on the Dashboard.
 - Two Columns
 - Three Columns

Note: This can be changed later if the dashboard needs to be expanded or reduced.

4. For each of the columns select the size:

- Narrow
- Medium
- Wide
- Custom: This setting requires that you select the number of pixels (between 200-800)

Note: If the dashboards will be printed, or if most of your users are using large monitor resolutions (e.g. 1024 x 768, 800 x 600), having more than one wide column will require users to scroll and or use more than one page to print the dashboards.

5. In the **Running User** field, use the Lookup button to select a user. The data that is shown on the dashboard is determined by this user. If you want the dashboard to show all the information stored in e-Builder, it is best to select an e-Builder Administrator.

6. From the **Folder** drop-down, select the folder to which you want to store the dashboard.

7. In the **Dashboard Permissions** section, select who has the permission to view these dashboards:

- This dashboard is available only to me
- This dashboard is available to all users
- This dashboard is available to the following roles.

Select the particular roles to provide dashboard access to users in those roles.

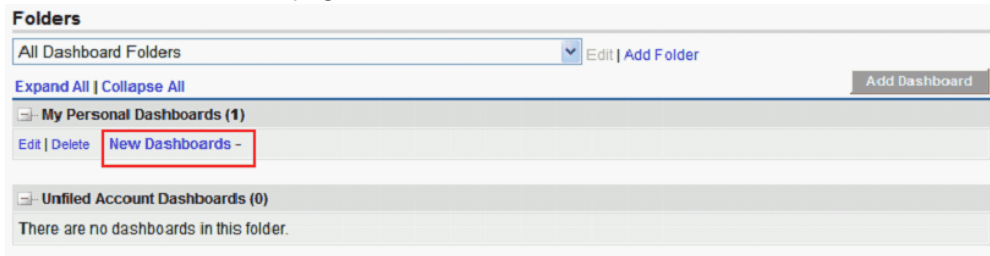
8. Click **Save**.

The dashboard has now been created.

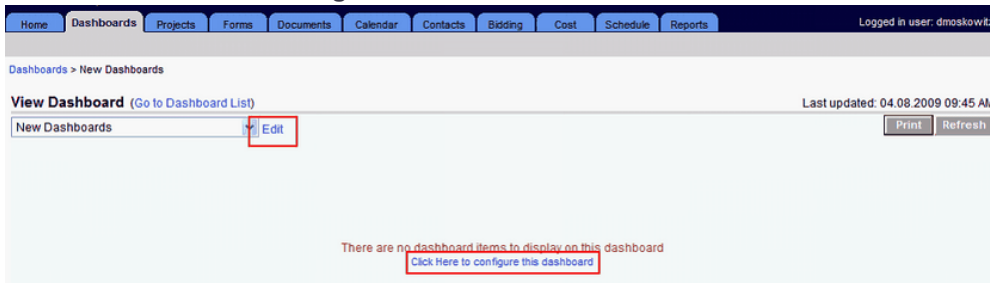
Adding Items to a Dashboard

How Do I Add Items to a Dashboard?

1. From the Dashboard List page, click the name of the dashboard.



2. Click the **Edit** link next to the name of the dashboard; or, if the dashboard does not have any items on it, click the **Click Here to configure the dashboard** link.



3. Click **Add Dashboard Item**.
4. Select a Component Type.
5. Select a Report.
6. Additional fields may be required, depending on the component type. Those fields will be indicated in red.
7. Click **Save** to create the dashboard item.

Note: The report selected must be either a Summary or Matrix report. The dashboard item will display the summary results of the left most column that is summarized.

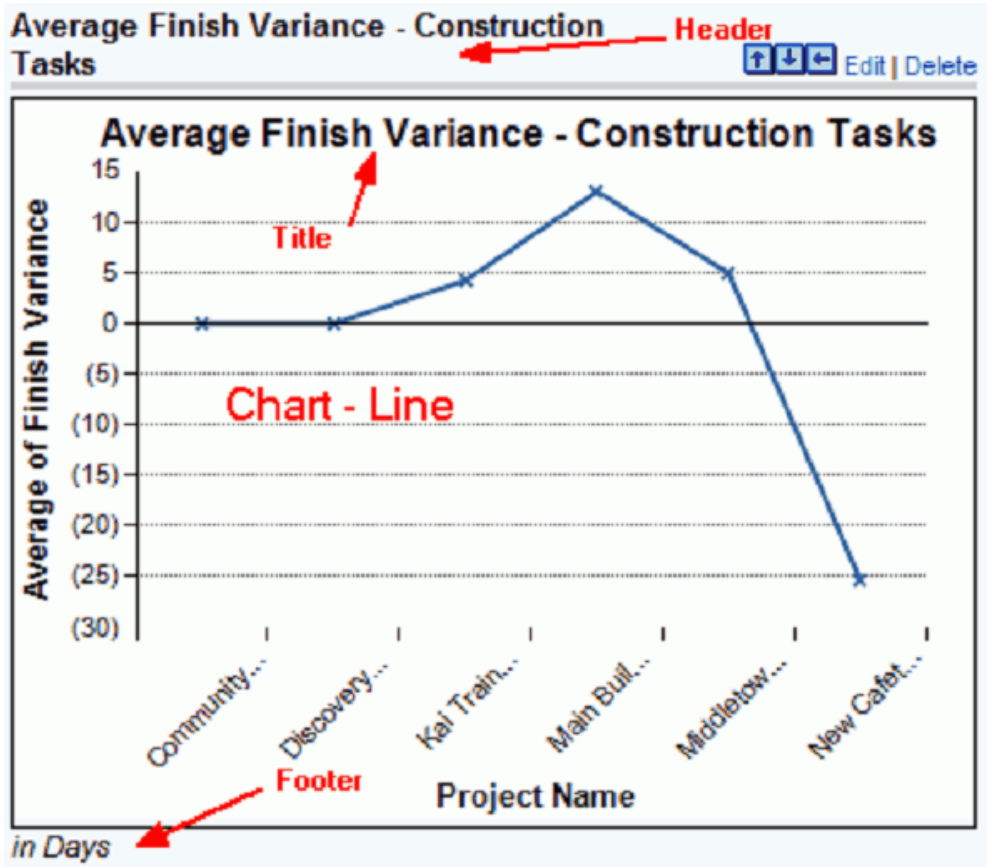
Types of Dashboard Items

The following are the types of dashboard items available:

- Chart
- Horizontal Bar
- Vertical Bar
- Line
- Pie

Chart

Chart Dashboard Items have a header, which appears above the item, a footer, which is listed at the bottom, and a title within the frame of the item.



Table

The Table Dashboard Items have a header, which appears above the item, and a footer, which is listed at the bottom. They also have the option to color code the results based on two thresholds that you specify:

- Anything lower than the first threshold will be displayed in the Low Range Color
- Anything higher than the second threshold will be displayed in the High Range Color
- Anything in between will be displayed in the Middle Range Color

Schedule Finish Variances

Project Name	Sum of Finish Variance In Days
Main Building Expansion	18
Middletown Elementary School	1
New Cafeteria	(27)

in Days

Metric

The Metric dashboard only displays the total of what is summarized on the selected report. Like the Table it has a header, footer, and color based on thresholds. It also includes a Metric Label. A metric will always be limited to a single row.

Tip

For metrics, you can add several metrics in a row and if there is no header or footer between them, they will end up displaying like a table. This lets you create your own table or grid. You would give a header to the top metric and a footer to the bottom one to make it look like just one table.

Note: Oftentimes, a metric will be placed beneath another dashboard item to display its total.

Schedule Finish Variances

Project Name	Sum of Finish Variance In Days
Main Building Expansion	18
Middletown Elementary School	1
New Cafeteria	(27)
<i>in Days</i>	
Total Variance	Metric (8)

Metric Label (with arrow pointing to 'Total Variance')

Gauge

The Gauge Dashboard only displays the Total of what is summarized on the selected report. It displays the results as a needle in between the range that you specify. You have the option to color code the results based on two thresholds that you specify:

- Anything lower than the first threshold will be displayed in the Low Range Color
- Anything higher than the second threshold be displayed in the High Range Color
- Anything in between will be displayed in the Middle Range Color

You should also specify a minimum and maximum value, which will set the range of the gauge.

Dashboard Item Settings

Dashboard: Administrative Management - Adoption

Settings

Component Type: Chart Table Metric Gauge

Header:

Footer: Last 30 Days

Title: Average User Logins

Custom Report: Dashboards - Avg User Logins

Minimum Value: 0

Maximum Value: 120

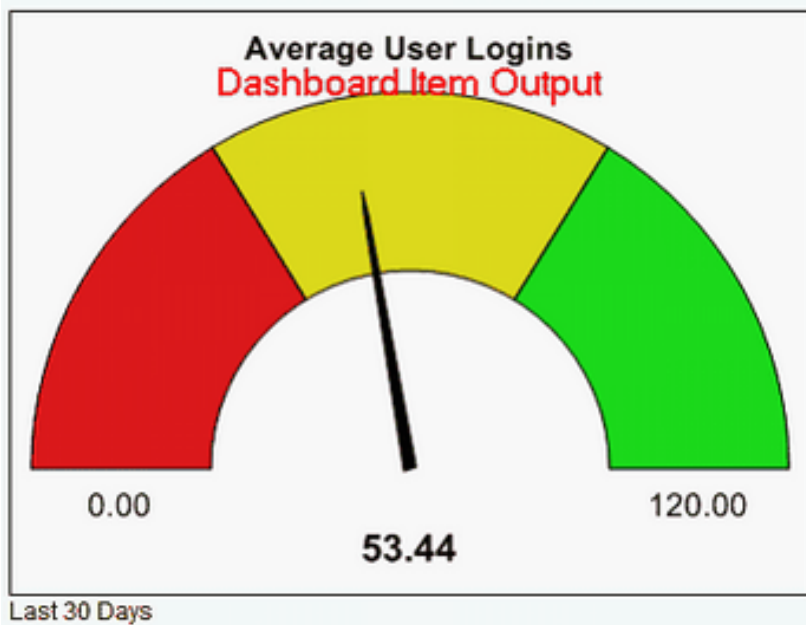
Low Range Color:

Low - Mid Cutoff Value: 39

Middle Range Color:

High Threshold Value: 81

High Range Color:



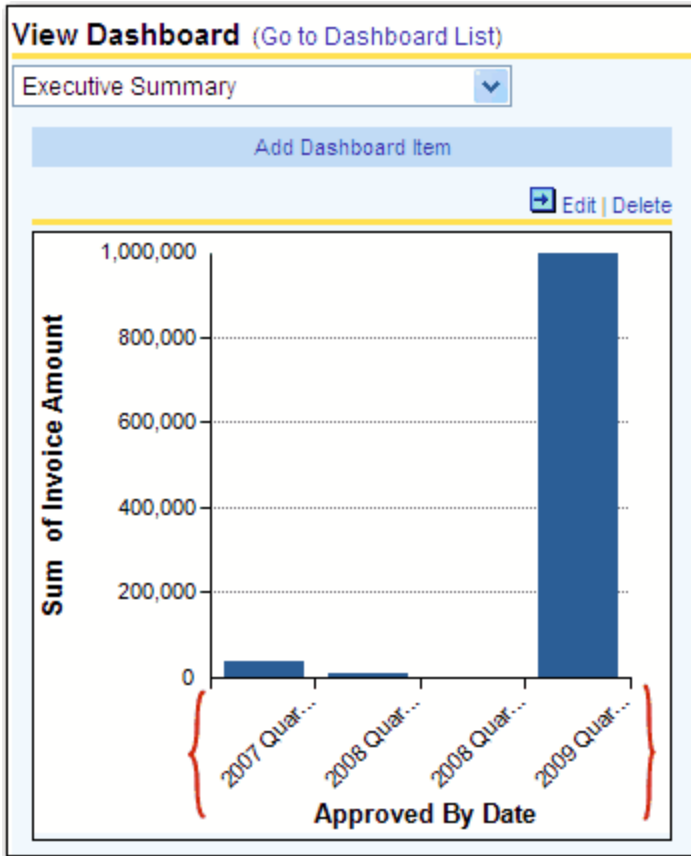
Specifying X Axis Label Lengths

e-Builder allows you to specify the length of the labels for the x-axis for charts you set up using the dashboard module which are either summaries or metrics, which are grouped by at least one category. This is helpful so that your x-axis labels are not truncated, causing confusion as to their identification.

Look at the example below. This is a vertical bar chart set up to show a summary of the actual costs for a project, grouped by quarter. In the red rectangle is the field for setting the X-axis label length:

Edit Dashboard Item	
Dashboard Item Settings	
Dashboard:	Executive Summary
Component Type:	<input checked="" type="radio"/> Chart <input type="radio"/> Table <input type="radio"/> Metric <input type="radio"/> Gauge
Header:	<input type="text"/>
Footer:	<input type="text"/>
Title:	<input type="text"/>
Custom Report:	Actual Cost (Program Summary, Grouped by Quarter) ▼
Chart Type:	Vertical Bar ▼
Sort By:	Row Label Ascending ▼
Maximum Items Displayed:	<input type="text" value="5"/>
Max X-Axis Label Length:	<input type="text" value="9"/>

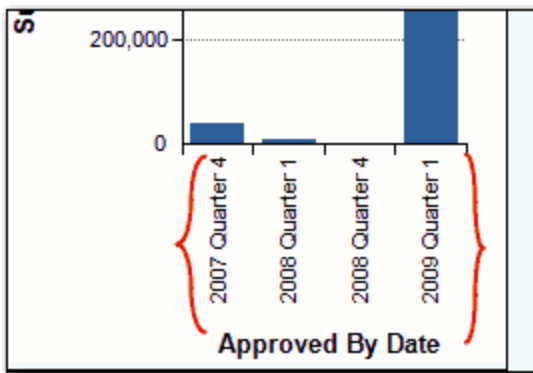
In this example, we have specified an X-axis label length of 9, which is the minimum. Notice that the labels are cut off (see items in the red parenthesis):



We can change the value of the X-axis label, so that the whole label is displayed. In this case, we enter 40 (the maximum value is 999):

Chart Type:	Vertical Bar
Sort By:	Row Label Ascending
Maximum Items Displayed:	5
Max X-Axis Label Length:	040

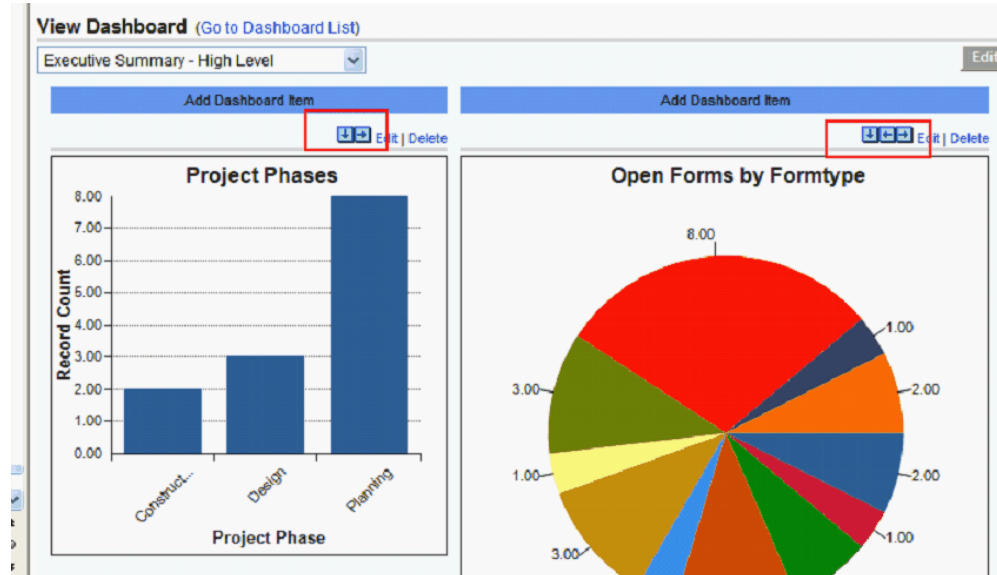
Here is the resulting chart (labels in the red parentheses are displayed, no longer truncated):



Editing a Dashboard Layout

How Do I Edit a Dashboard Layout?

Once dashboard items have been added they can be reorganized by clicking on the blue arrows above them.



To edit an existing Dashboard

1. From the Dashboards Tab, click the **Go To Dashboard List** link.
2. Click the **Edit** link.
3. Reorganize dashboard items by clicking on the blue arrows above them. Modify the settings as needed.
4. Click **Save**.

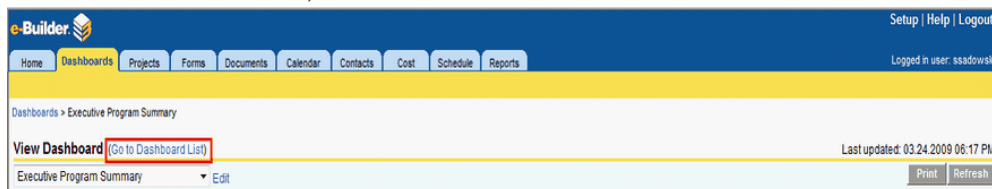
Working with Dashboard Folders

How Do I Organize My Dashboard Folders?

Just as you can with Report folders, you can store your Dashboards in different folders. This helps you organize your information.

To create a dashboard folder

1. From the Dashboards Tab, click the **Go to Dashboard List** link.



2. Click the **Add Folder** link.
3. Enter the name of the Folder in the Folder Name field.

4. Click **Save**.

Printing a Dashboard

To print a dashboard

- Click the **Print** button in the top right corner of the page.

Note: You may need to change your print settings to Landscape to capture the entire Dashboard.

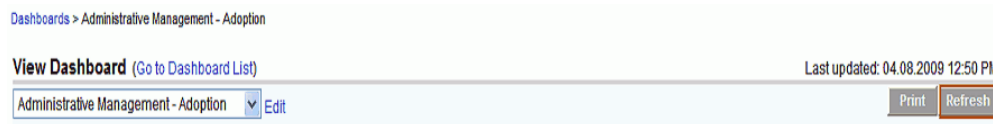


Updating a Dashboard

How Do I Update the Results of a Dashboard?

In the top right hand corner of the dashboard the time and date of when the results were last calculated is displayed; however, note that the time displayed is not always up to the second.

To update the results, simply click the **Refresh** button. The dashboard's results will be updated.



About the Documents Module

An immense amount of data is generated throughout the life of a project, and the Documents module gives team members a central location to store, organize, and access the files they need. Folder permissions can be set to limit access to specific files. In this way, administrators control who is able to submit, edit, delete, and view the files in each folder. The folder structure can be arranged in any way that is best suited to support your internal processes. It gives all project participants, from the Project Executive to the Project Assistant, quick access to project files.

One of the key advantages of using the e-Builder Documents module is that all project members are able to access the most up-to-date files from any location, at any time. The Documents module makes it easy to share documents via email or through notifications. In support of the collaborative nature of capital program management, team members are able to work on files collectively, check files in and out of the system, and redline documents while maintaining document version control. When internal or external participants are uploading files into the system, they are required to specify a folder in the document structure, which ensures that all files within the system are stored in a central location.

For increased visibility, features such as document access history are available to Administrators. You can also restore deleted files, and users with the appropriate permissions can easily review and modify document custom fields. Whether in the planning, design, build, or operating phases of the project, the Documents module streamlines the exchange and sharing of information while reducing the effort, time and cost associated with this process.

Access Project Documents Page

There are two methods of accessing the Project Documents 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 help you avoid having to reselect your project.

To access the Project Documents page for a specific project

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

The Project Documents page is displayed.

To access the Project Documents page for the current project

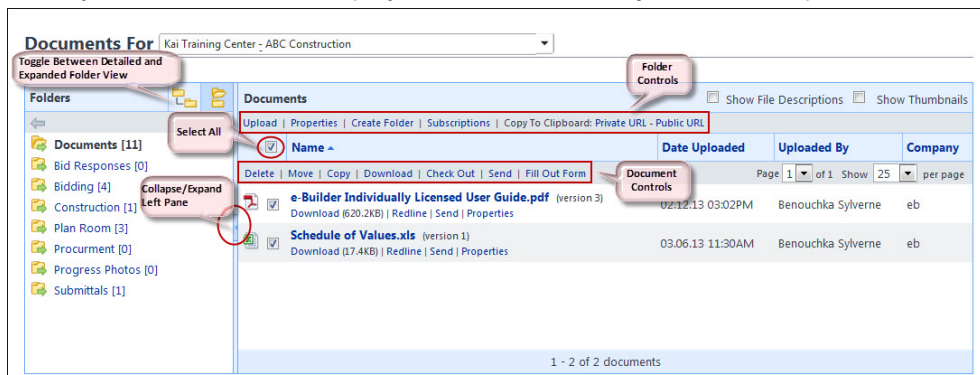
If you are already within a project, you can access the Documents module via the Project Menu located in the Left Navigation Pane.

- Click **Documents**.

The Project Documents page is displayed.

Documents Page Overview

The Documents page is central to working with documents. The folder structure is located in the left pane. When you select a folder, it displays its contents in the adjacent content pane.



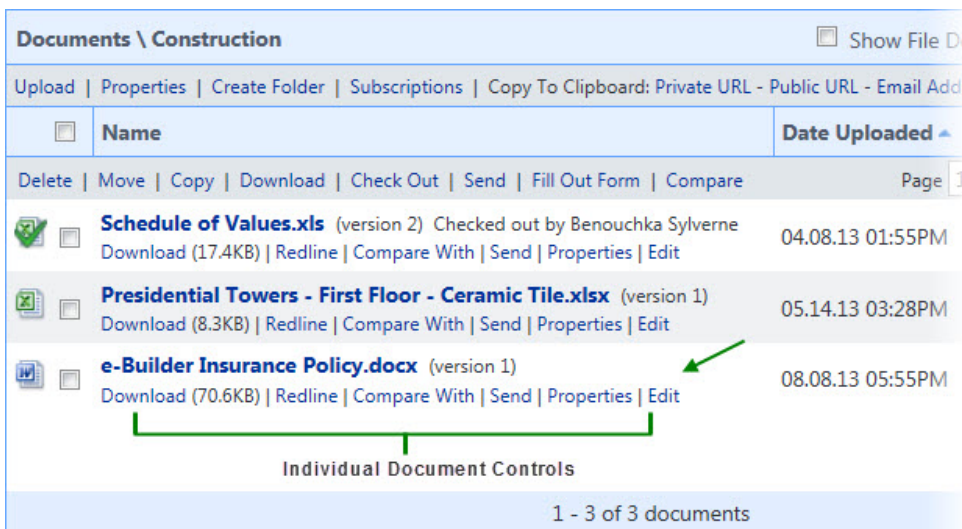
Documents controls

The controls located directly above the list of documents allow you to take action for one or more of the selected files.



- **Delete:** Deletes the selected files.
- **Move:** Moves the selected files to a different folder or project. For instructions, see Move Documents.
- **Copy:** Copies the selected files to a different folder. For instructions, see Copy Document.
- **Download:** Downloads the selected documents. If more than one file is selected, it zips the files for download.
- **Check Out:** Checks out the selected files. For instructions, see Check Out Files.
- **Send:** Sends the file via email or notifies an internal user of the document. For instructions, see Send Files.
- **Fill Out Form:** Fills out a form with the selected files attached. For more information, see the Fill Out Form window.
- **Compare:** Compares two selected files. The document compare feature allows you to identify the changes that have been made to a file. You can view files in different ways to best suit your needs. Overlays with difference detectors, side-by-side views, and highlighting the additions and deletions are all options that are available to you. For instructions, see Compare Documents.

Individual document actions



- **Filename:** Click on the filename to view it in a document viewer.

Document Viewer - Supported File Types

The following file types can be viewed in the document viewer:

- doc
- docm
- docx
- eps
- msg
- mpp
- nwd
- ppt
- pptx
- rtf
- tif
- tiff
- txt
- vsd
- xls > 15 MB (Convert large files to .xlsx)
- xlsb
- xlsx

Note:

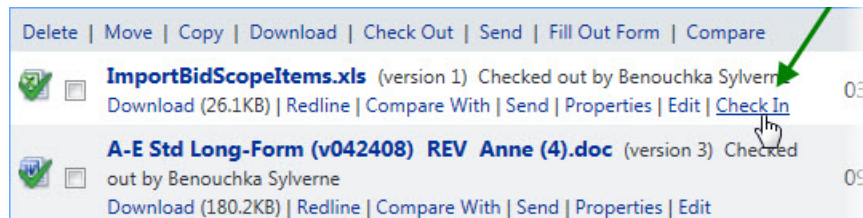
- To view file types that cannot be viewed in the document viewer, you must first download it and view it with its native application.
 - A filename that is greyed out indicates that it is being processed to be viewed in the document viewer. Large files may take some time to process.
 - A greyed out filename may also indicate that the file is not able to be processed for viewing due to unsupported file type or overly large file size.
 - Files that cannot be viewed (greyed filename) are problematic when attached to a process instance as part of a mail merge. The mail merge will not execute with this attachment and the process will stall.
 - PDF documents created using Adobe LiveCycle Enterprise Suite are not supported in modern browsers (e.g., Chrome 45 and later, Firefox 52 and later, Edge.) To view them, download and view them using Adobe PDF Reader, or convert the files to a format readable by browsers. To convert the file, open it in Adobe PDF reader, then print the document and choose Microsoft to PDF as the printer. This will create a PDF that can be uploaded and viewable in e-Builder.
- **Download:** Downloads the file, which allows you to save or make changes in its native application.

- **Redline:** Annotates or marks up the file. Redlining does not modify the actual file. It creates an overlay on top of it that exists only in e-Builder. After you save your redline and return to the Documents module, a counter appears under the file name that shows how many redline layers have been created for the document.

Tip

To view a redline markup outside of e-Builder, save the markup as a .jpg (image).

- **Compare With:** Compares the file with another document saved in the document library. The document compare feature allows you to identify the changes that have been made to a file. You can view files in different ways to best suit your needs. Overlays with difference detectors, side-by-side views, and highlighting the additions and deletions are all options that are available to you. For instructions, see Compare Documents.
- **Send:** Sends the file via email, or via fax to an internal or external project participant. For instructions, see Send Documents.
- **Properties:** Displays individual file properties. For a description of this window, see File Properties General Tab Overview.
- **Edit:** This link is only available for Word, Excel and PowerPoint files. Click to edit any of these files types within their native application. The ability to edit documents directly from e-Builder will help you avoid having to download the file, make changes, save to your local directory, and then upload the file back into e-Builder. When you edit documents in place, all of your changes are saved in a temporary file that allows you to navigate away from the file and e-Builder, and return to complete your changes at your leisure. To save the updated document in e-Builder, click the **Check In** link, and the file will be saved as a different version.



Note: Account administrators are able to check files in at any time. In the event that the person who originally checked the file out for editing is not available, account administrators will be able to undo checkout in the file's properties or by clicking Check In from the Project Documents page. The file will be saved as a new version and all changes made by the editor will be maintained.

For more information, see Edit Documents.

- **Check In:** This link is only visible to those who currently have the file checked out, and to account administrators. These users have the option to check files in if the file was checked out or is currently being edited.

Access Document History Page

The Access Document History page allows you to locate documents stored in the Documents module. Use this page to view the access history of specific files. From this page you're able to search for files that are currently in the system or have been deleted.

For instructions, see View Document Access History.

The fields and buttons located on this page are:

Fields and Buttons

- **Access Document History for:** Click to view document access history for a different project.

Filter Documents - Fields and Buttons

- **Document Name:** Enter the name of the file.
- **Document Type:** Enter the document's file extension.
- **Accessed By:** Enter a username to filter results by. Only one username can be entered at a time.
- **Company:** Enter a company name to filter results by. Only one company name can be entered at a time.
- **Access Type:** Click to select an access type to filter by.
- **Date Range:** Enter a date range to filter by. You can also click the calendar icons to select dates from the calendar.
- **Filter:** Click to filter by the selected criteria.

Results Table - Fields and Buttons

- **Version:** Display the document version number.
- **Document Name:** Displays the name of the file version.
- **Accessed By:** Displays the name of the user that accessed the file version.
- **Accessed By Company:** Displays the name of the company that the Accessed By belongs to.
- **Access Type:** Displays the method that the file version was accessed.
- **Timestamp:** Displays the date and time the file version was accessed.
- **Export to Excel® Icon:** Click to export the record to an Excel spreadsheet.

Sent Items Page

The Sent Items page allows you to search for files that have been emailed or sent via notification, from the Documents module. For steps on sending items from the Documents module, see Send Documents.

A description of the fields and buttons located on this page follows:

- **Cancel:** Click to cancel the search and return to the Project Documents 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. This is a string-type project custom field. For instructions on creating this field, see Manage Custom Fields.
- **Show Failed Messages:** Select this check box to include only failed messages in the filter results.

Filter

- **Sent To:** 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.

- **File Name:** Enter the file name you want to include in the filter.
- **Date Sent Between:** Enter a date range that the file was sent to include in the filter.
- **Body:** Enter a single keyword or phrase contained in the body of the message to filter by. Avoid the use of commas.
- **Type:** Select the delivery type of the sent item.
- **Filter:** Click to filter by the selected criteria.
- **Reset:** Click to clear filter fields.

Messages

- **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 that the item was sent to.
- **Sent By:** Displays the name of the user that sent the message.
- **Delivery Address:** If sent to an e-Builder contact or user, their delivery address displays here.
- **Status:** Displays the status of the items.
- **# Times Opened*:** Displays the number of times the file was opened. This number may be unreported if the recipient email client blocks images.

Document Log Page

The Document Log page displays a list of all project documents stored in the Documents module. You can use this page to learn about when a file was uploaded and by whom, the folder path where it is stored, its checked in or check out status, and where it is used throughout the system.

The following fields and buttons are available on this page:

- **# Files / # Versions / # Storage Used:** The # Files indicates the number of individual files that have been uploaded. If you upload new versions of a file, the # Versions count will include the versions.
Example: File A and B were uploaded yesterday. A new version of a file is uploaded today = 2 Files , 3 Versions
- **Show Empty Folders:** Select to show empty folders in the list below.
- **Show Checked-Out Files Only:** Select to filter for files that have been checked out.
- **Export:** Click to create one of these exports: Excel Data Export, CSV Data Export, or Tab Delimited Text.
- **Folder Name:** Displays the folder path where the file is stored.
- **File Name:** Displays the file name.
- **File Size:** Displays the file size.
- **Uploaded By:** Displays the name of the user that uploaded the file.
- **Date Uploaded:** Displays the date that files were uploaded.
- **Redline Count:** Displays the number of redlines saved on the file. Click to open the document.
- **Checked Out By:** If currently checked out, displays the name of the person that has the file checked out.

- **Date Checked Out:** If currently checked out, displays the name of the person that has the file checked out.
- **Attached To:** If the file is attached to a process, cost item or meeting item, the Attached To link displays. Click to view all items the file is attached to and associated details. The File Properties - Attached To window displays.

Find Deleted Items Page

This page will only display for users with administrative permissions.

The Find Deleted Items page allows you to search for, view, and recover deleted items.

Fields and Buttons

The fields and buttons located on this page are:

- **Search for:** Enter the name of the file, including the file extension that you want to search for.
 - **Tip:** Use an asterisk (*) as a wildcard search.
- **Search in:**
 - **File names:** Select to include document file name in search results.
 - **Folder names:** Select to include folder name in search results. Click the adjacent drop-down arrow to select a date range when items were deleted.
- **Search:** Click to search for deleted items. Results display in the table below.
- **Name:** Displays the name of the deleted file.
- **Date Deleted:** Displays the date that the item was deleted.
- **Deleted By:** Displays the name of the user that deleted the item.
- **Folder Path:** The folder path where the file was located displays underneath the file name. Click this link to open the Folder Properties - Recycle Bin page where account and project administrators can optionally restore the file.

Documents Custom Fields Page

Folder and document custom fields can be modified by system and project administrators only.

This menu option does not display if Project Document Control has not been enabled on the Project Details Settings tab. The administrator must also establish document type and custom field associations.

The Documents Custom Fields page is optimized for viewing document types and custom fields, which makes it easier to view or modify multiple folder and document custom fields at a time.

Fields and Buttons

The fields and buttons located on this page are:

- **Document Custom Fields for:** Click to view document custom fields for a different project.
- **Show untagged files only:** Select to display only those files and folders that do not have document custom fields filled out. See Update Document Custom Fields and Update Folder Custom Fields for more information.

- **File:** Displays selected file name. Click the left and right directional arrows to select the previous or next file in the selected folder.
- **Save:** Click to save changes.
- **File Description:** Enter a description of the file.
- **Document Type:** Click to specify a document type to be the default value for all uploaded files in this folder. If document types and custom field associations have been established, the associated custom fields appear in the Custom Field section below for you to choose from. For instructions on making these associations, see Associate Custom Fields with Document Types.

If the e-Builder Plan Room is enabled on your account, the document type classification is necessary for users to locate and view files in the plan room viewer.

Note: If a document type is set on the parent folder, it will display here automatically, because sub-folders inherit the document type selection of the parent folder.

- **Custom Fields:** This section automatically displays if a document type is selected that has custom fields associated to it. Enter a value for each custom field.

File Properties General Tab

This window is displayed when the document properties link is selected on the Project Documents page. The General tab is highlighted by default. From here you can view file property details and take the following actions:

- Redline Documents
- Move Documents
- Copy Documents
- Check Out Documents
- Check in Documents
- Revert to a previous version of the file

To revert to a previous

Fields and Buttons

- **View:** Click to view the file in a separate window.
- **Redline:** Click to add redline markups to the file.
- **Download:** Click to open the file or save it locally in its native format.
- **Delete:** Click to delete the file. You are prompted for confirmation.
- **Check In:** Click to check in the file. Only displays for files that are currently checked out. If a different file name is checked in, the new file name will be used, but the version number will be updated. Files can also be checked in by uploading the file (with the same name) into the same folder. For detailed steps on both methods, see Check In Files.
- **Undo Check Out:** Click to check in a file that was recently checked out.
- **Check Out:** Click to check out the file.
- **Revert to Revision:** Click this button to revert a file to a particular version. This button is displayed and available only when there are multiple versions of a document.

- **Move:** Click to move the file to a different folder or project. Moving files automatically deletes files in the original location. When a file is moved between projects all of the history associated with the file is deleted. Using this feature, users do not have to manually delete old files after they have been copied over. If you do not want to delete the original documents, do not move the files, you may choose to copy documents instead.
- **Copy:** Click to copy the file to another folder or project.
- **Save:** Click to save changes.
- **Cancel:** Click to discard changes and close this page. All unsaved changes will be lost.
- **Name:** Displays the name of the file. This is also an editable field. The version of the file displays in parentheses next to this field.
- **Description:** Displays a description of the file, if one exists. This is also an editable field.
- **Type:** Displays the file type.
- **Location:** Displays the folder path where the file is saved.
- **Size:** Displays the file size.
- **Added By:** Displays the user that uploaded the file to this folder.
- **Date Added:** Displays the date that the file was added.
- **Last Modified By:** Displays the user that last modified the file.
- **Date Modified:** Displays the date the file was modified.
- **Private File URL:** Displays the file's private web address, which can be sent to other e-Builder users. Recipients will have to log into e-Builder to access the file if they are not already logged in.
- **Public File URL:** Displays if the folder the file is saved in is a public folder. This is the files URL, which can be sent to external project participants.
- **Check Out By:** Displays the name of the person that currently has the file checked out.

File Properties Custom Fields Tab

This tab allows you to view and modify the file's document type and custom fields. This tab does not display if the Project Document Control has not been enabled on the Project Details Settings tab.

Tip

If you'd like to modify the custom fields for a number of files at a time, go to the Document Custom Fields page, where you can scroll through all the files in a given folder and specify the custom fields for each. For instructions, see Review Folder and Document Custom Fields.

Fields and Buttons

The fields and buttons located on this page are:

- **Save:** Click to save changes.
- **Cancel:** Click to discard changes and close this page. All unsaved changes will be lost.
- **Name:** Displays the file name.
- **Document Type:** Displays the file type. Click the drop-down arrow to assign a different file type.

- **Custom Fields:** This section lists all document custom fields that have been associated with the selected document type. For more information, see Associate Custom Fields with Document Types.

File Properties History Tab

The history log of a document allows account and project administrators to see who accessed the file, when the file was accessed, and in what manner.

Fields and Buttons

The fields and buttons located on this page are:

- **View History for All Versions:** Select to view the history for all document versions. The history for the most recent version displays by default.
- **Cancel:** Click to close this window.
- **Version:** Displays the version of the file. File versions can be created by uploading the same file (with the same name) into the version and by checking files out and then checking them in again. See Check Out Files and Check In Files for more information.
- **Name:** Displays the name of the person who accessed the file.
- **Company:** Displays the company associated with the person that accessed the file.
- **Timestamp:** Displays the date and time that the file was accessed.
- **Access:** Displays the manner in which the file was accessed.

File Properties Permissions Tab

This tab allows you to view and modify file permission settings. When a document is uploaded, it inherits the parent folder's permission settings, but you can change settings for individual files as well. Document permissions are role specific, and cannot be set for individual users. Add the roles you wish to specify permissions for, and then create your settings for each selection.

From this tab, you can Redline documents.

Fields and Buttons

The fields and buttons located on this page are:

- **OK/ Apply:** Click to save changes.
- **Cancel:** Click to cancel and close this window. All unsaved changes will be lost.
- **Add:** Click to open the Add Permissions window and select the roles or users you want to set access rights for. For your convenience, you have the choice of specifying permissions on the Add Permissions window or on this page; the same permission check boxes are available on both.
- **Remove:** Click to remove the selected role from the list of roles below. If a role is not listed, it means that role does not have access to this file.
- **List Members:** Click to open the Members window and view who the members of the selected project role are.
- **View:** Select to allow users in the highlighted role permission to view this file in this project. (Any author or recipient of the file will be able to see the files they created/ received, regardless of this permission.)

- **Download:** Select to allow users in the highlighted role to download the file to a local storage in the native file that the file was uploaded in.
- **Redline Markup:** Select to allow users in the highlighted role to redline or mark up a file.
- **Modify:** Select to allow users in the highlighted role to update the document name and description. This allows you to have version control to this file. If not selected, a new file will be created upon upload with a sequential number versus another version.
- **Delete:** Select to allow users in the highlighted role to delete this file, even if another user created it.
- **Change Permissions:** Select to allow users in the highlighted role to Update permissions for this file.
- **No Access:** This role has no access to this file. This permission overrides any other permissions the user may be granted. Once you have selected your permissions, click **Apply**.

File Properties Versions Tab

This tab allows you to view the different version of the file. File versions can be created from checking out and checking in files as well as by uploading new versions of the same file, as long as the file name is the same. From this tab you are also able to view and download files.

Fields and buttons

The fields and buttons located on this page are:

- **Cancel:** Click to close this window.
- **Compare:** Select the check box of the two versions you wish to compare and then click Compare. This button appears only when there is more than one version.
- **View:** Click to view the file in a separate window.
- **Download:** Click to download the file.
- **#:** Displays the file's version number. Click to view the general properties of this file.
- **File Name:** Displays the file name. Click to view the general properties of this file.
- **Description:** Displays the file description.
- **User:** Displays the user that uploaded the file.
- **Date Created:** Displays the date the file was created.

File Properties Attached To Tab

This page provides a list of all the items the document is attached to. A document can be attached to any of the items listed below:

- Budget, Commitments, Invoices
- Bid Packages
- Forms
- Process Instances
- Planning Scenarios

Fields and Buttons

The fields and buttons located on this page are:

Forms

- **Project:** Displays the name of the project that the file was attached in.
- **Form:** Displays the form type that the file was attached to.
- **Subject:** Displays the subject of the form.
- **Author:** Displays the name of the user that attached the file.
- **Held By:** Displays the name of the user whose court the form is currently in.
- **Date Due:** Displays the form's due date.
- **Attach Type:** Displays the manner in which the file was attached.

Process Instances

- **Project:** Displays the name of the project that the file was attached in.
- **Process:** Displays the form type that the file was attached to.
- **Subject:** Displays the subject of the process.
- **Date Due:** Displays the date that the process step is due.
- **Step Name:** Displays the step that the process is currently in.
- **In Step Since:** Displays how long the process has been in the current step.

Working with Documents

From the Documents module, you can do perform the following actions on documents:

Upload Documents

To upload documents

1. Go to the Project Documents page.
2. Select the folder that you want to upload files to.
3. Click the **Upload** link.
4. Drag and drop your files to the **File Upload** window.

—Or—

Click **Browse** and locate the files to upload.

Tip: You can also drag and drop (or browse) your files to the Documents content pane.

Open Documents

From the Project Documents page, you will only see the folders and files you have access to. By default, the contents of the folder appear in the Content Pane.

To open documents

1. Go to the Project Documents page.
2. Select the folder that holds the file you want to open.
3. Click the title of the document.

Download Documents

Downloading documents gives you the option to open the file for immediate viewing or save the file locally. This option might be confused with checking-out files, which should only be done if you want to restrict access to a certain document while you make changes to it. For more information, see [Check Out Documents](#).

To download documents

1. Go to the Project Documents page.
2. Navigate to the file you want to download.
3. Click the **Download** link located under the file name you want to download.
4. Click Open to open the file.

—Or—

Click **Save** to save the file locally.

Delete Documents

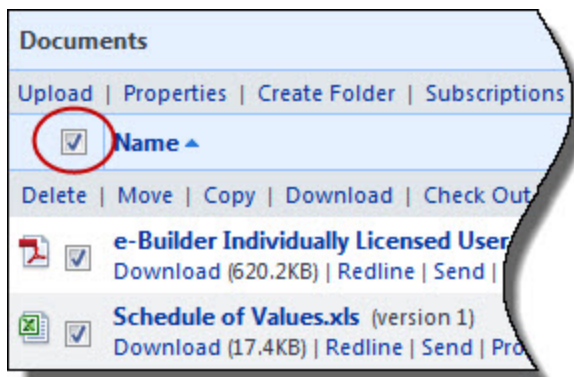
Deleting documents removes the files from the Documents module. However, if the file was attached to in other modules in e-Builder, such as Forms or Processes, the attached files will not be deleted. Only users with delete permissions for the folder where the file is stored is able to perform this function. Once files are deleted, they can only be recovered by an account or project administrator.

To delete documents

1. Go to the Project Documents page.
2. Navigate to the file you want to delete.
3. Select the check box next to the file you want to delete.

—Or—

To delete all the files in the folder, click the **Select All** check box.



4. Click the **Delete** link. You are prompted for confirmation.
5. Click **OK**.

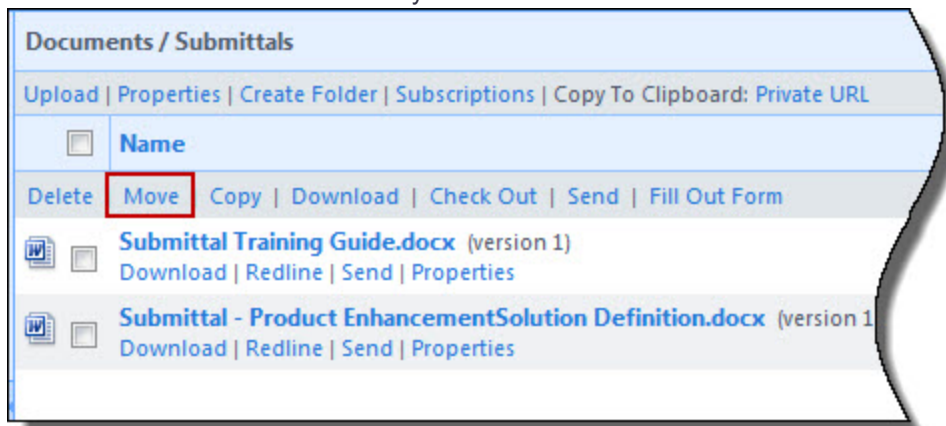
Move Documents

You have the ability to move files between folders and across projects. Moving files automatically deletes them from the original location. When a file is moved between projects, all of the history associated with the file is deleted. When using this feature, you do not have to manually delete old files after they have been copied over. If you do not want to delete the original document, you might choose to copy documents instead.

Note: You need to have Create Folder permissions and Modify Document permissions to perform this task. For instructions, see Edit Folder Permissions and View/Edit (Manage) Document Permissions.

To move documents between folders or projects

1. Go to the Project Documents page.
2. Navigate to the file you want to move.
3. Select the check box next to the file you want to move.



4. Click the **Move** link located above the file list.

The Move File window is displayed.

Note: If you do not want the file to inherit the permissions of the folder you are moving the file to, clear the **Inherit file permissions from destination folder** check box as this setting is enabled by default.

5. To move files to a different folder within the same project, click the folder name. When prompted, click **OK**.

—Or—

To move files to a different project, select the project from the **Move [number of files] to Project** drop-down menu. Navigate to and select the destination folder. Click **OK** on the confirmation dialog box.

Copy Documents

Documents can be copied to different folders and across projects by anyone with access to the file.

Note: You need to have Create folder permission on the folder you are copying the file to in order to perform this task. For instructions, see Edit Folder Permissions.

To copy documents

1. Go to the Project Documents page.
2. Navigate to the file you want to copy.
3. Select the check box next to the file.
4. Click **Copy**.
5. To copy files to a different folder within the same project, click the folder name. You are prompted for confirmation. Click **OK**.
—Or—
To copy files to a project, click the projects drop-down arrow and select a project. Navigate to and select the destination folder. When prompted, click **OK**.

Check Out Documents

The Check Out feature in e-Builder allows you to hold exclusive rights to upload new versions of a document. When a document is checked out, all other users are blocked from uploading a new version of the file. The benefit of using this feature is that all users are informed that you are making updates to the file, and it prevents them from uploading their changes while you have the file checked out.

To check out documents

1. Go to the Project Documents page.
2. Navigate to the files you want to check out.
3. Select the check box next to the files.
4. Click the **Check Out** link located above the file list.
5. To download the file at this time, click **OK**.
—Or—
To confirm the check out, but not download the file, click **Cancel**.

Revert Document to a Previous Version

When there are multiple versions of a document, e-Builder allows you to revert a file to a particular version.

To revert a document to a previous version

1. Go to the Project Documents page.
2. Click the Properties link for the document you wish to revert. The File Properties window is displayed and the General tab is displayed by default.
3. Go to the File Properties - Versions tab.
4. Click the file name of the previous version of the file that you wish to revert to.
The File Properties - General tab of that version is displayed.
5. Click the **Revert to Revision** button.
You will be prompted to confirm whether you wish to revert the document to this version of the file.
6. Click **OK** to confirm. The selected version will be added as a new version number (incremental).

Undo Check Out

In that event that files were checked out by accident, the person that checked the file out has the ability to reverse this action and undo check out.

To undo check out

1. Go to the Project Documents page.
2. Navigate to the folder where the file was checked out of.
3. Click the file's **Properties** link.
4. On the File Properties window, click **Undo Check Out**.
5. Click **Save**.

Check in Documents

Only the user who checked out the document and administrators have the ability to check in files. In the event that documents were checked out by accident, you can undo check out. There are two other ways to check in a file: by uploading the file (with the same name) into the folder it was checked out of, or by clicking the Check In button in the File Properties window. You will not be able to check in a document if its name has changed because it will be considered a new file.

Undo Check Out

To undo check out

1. Go to the Project Documents page.
2. Navigate to the folder where the file was checked out of.
3. Click the file's **Properties** link.
4. Click **Undo Check Out**.
5. Click **Save**.

Check In by Uploading into Folder

To ensure a successful check in, please make sure that you are checking in the exact same file name. The version number will automatically update after the file has been uploaded.

To check in a file by uploading it

1. Go to the Project Documents page.
2. Navigate to the folder where the file was checked out of.
3. Click **Upload**.
4. Click **Select Files** to navigate to and select the file you want to check in.
5. Click **Upload Now**.
6. Click **OK**.

If document custom fields are enabled on your account, the Update Custom Fields window is displayed.

7. Update document custom fields.
8. Click **Save**.
9. Click **Close**.

Check In via File Properties Page

Note: If a different file name is checked in, the new file name will be used, and the version number will be updated.

To check in a file via file properties

1. Go to the Project Documents page.
2. Navigate to the folder where the file was checked out of.
3. Click the file's **Properties** link.
4. Click **Check In**.
5. On the Upload File page, click **Browse**.
6. Navigate to and select the file.
7. On the Upload File page, click **Upload File**.
8. On the File Properties tab, click **Save**.

Compare Documents

Compare documents to each other in order to identify the changes that have been made to the file. You can view files in different ways to best suit your needs; overlays with difference detectors, side-by-side views, and highlighting the additions and deletions are all options that are available to you.

Note: To compare documents, you must have Redline Markup permission for the folder in which those documents are located.

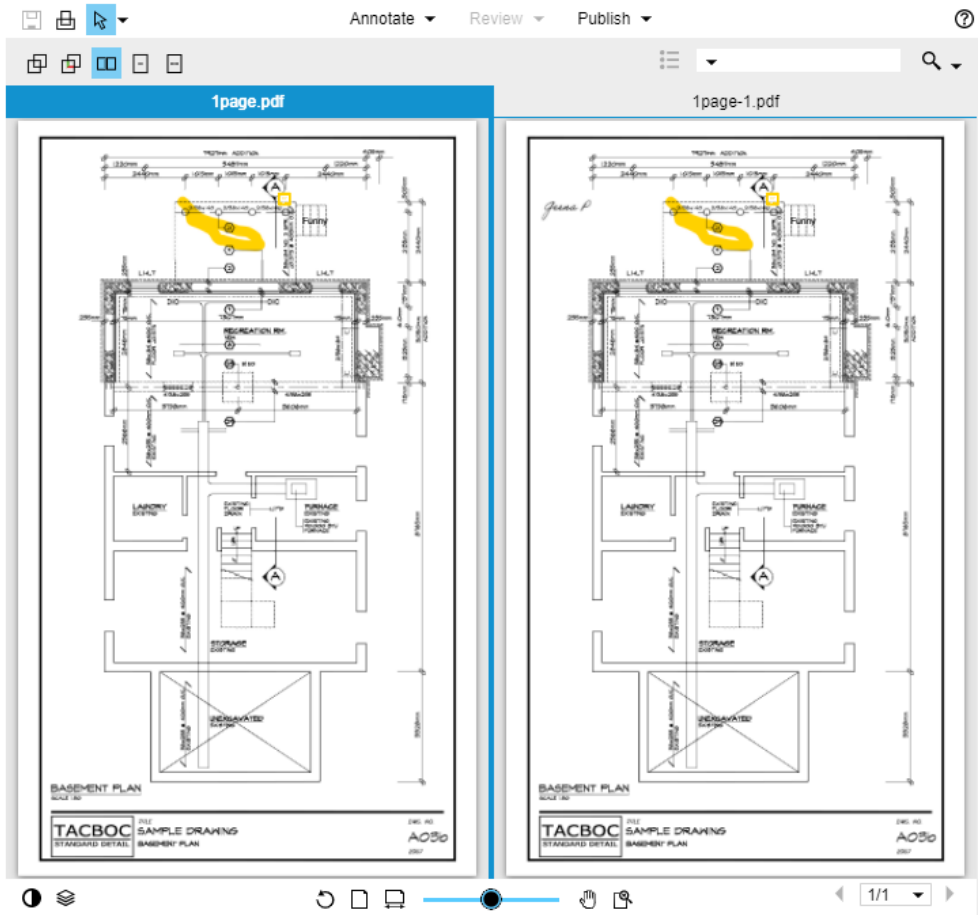
To compare documents

1. Go to the Project Documents page.
2. Navigate to one of the documents you want to compare and click **Compare With**.

Daily Reports.pdf (version 1)
[Download \(2.3MB\)](#) | [Redline](#) | [Compare With](#) | [Send](#) | [Properties](#)

3. On the Compare Documents from window, select the check box next to the other document to use in the comparison.
4. Click **Compare**.

The files open in the Compare Tool.



Send Documents

The send feature allows you to send files directly from the Documents module to individuals who are not licensed e-Builder users or to license holders who do not have access to specific folders on the project. Files can be sent via email. You can also notify internal users of files by choosing the notify option. This sends users the name of the files and a link to where the files can be retrieved in e-Builder. You can send / notify a single file or a group of files located in the same folder.

To send files or notify users

1. Go to the Project Documents page.
2. Navigate to and select the check box next to the files you want to send.
3. Click the **Send** link located above the file list.
4. Select a method for sending:
 - **Email:** Email files to internal or external project participants
 - **Notify:** Notify internal project participants
5. Click **Next**.
6. Complete all necessary fields.

Tip

When sending an email, use your keyboard to auto-fill and select the desired email addresses. Begin typing the recipient's name or email address, then use the arrows to highlight the email of choice, and then click **Tab** to make the selection.

7. Click **Send**.

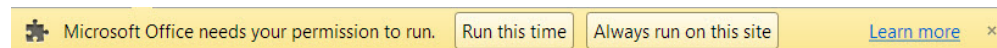
Browser Settings for Editing Documents in Place

When editing files for the first time using Google Chrome™ or Mozilla® Firefox®, you will be prompted to complete browser settings as described below.

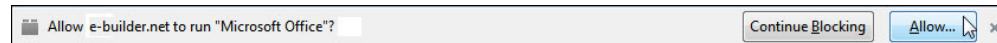
- Google Chrome™ Browser Settings
- Mozilla® Firefox® Browser Settings

Preliminary Settings for Google Chrome™ Browser

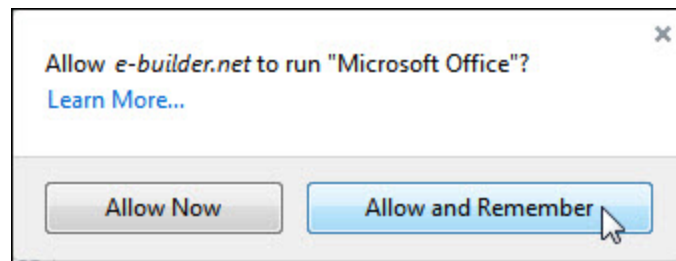
In the Google Chrome browser, a message from Microsoft Office appears in the banner of every page that includes an Edit link. Click **Always run on this site** to enable document editing from e-Builder Enterprise. This is a one-time setting that will not have to be reconfigured.

**Preliminary Settings for Mozilla® Firefox® Browser**

When using the Mozilla Firefox browser, you will be prompted to allow e-Builder to run Microsoft® Office®. This message will appear in the banner of every page that includes an Edit link. Click **Allow** to enable document editing from e-Builder Enterprise.



A subsequent message displays, requesting you to choose a setting for future occasions. Click **Allow and Remember**.

**Edit Documents**

Note: This feature is only compatible with Microsoft® Office versions 2010 and above. If an earlier version of Office is installed on your machine, the Edit link will be disabled. If your organization utilizes a different version of Office and you wish to disable this feature on your account, please contact e-Builder Support.

All Word, Excel® and PowerPoint® files that you have the permission to modify can be edited directly from e-Builder Enterprise. An Edit link appears next to each document of these file types to help you avoid having to download the file, make changes, save to your local machine, and then uploading the file back in to e-Builder.

Note: Account administrators are able to check files in at any time. In the event that the person who originally checked the out for editing is not available, account administrators will be able to undo check out via in the file's properties or by clicking Check In from the Project Documents page. The file will be saved as a new version and all changes made by the editor will be maintained.

Editing Documents

To edit documents in place

1. Click the **Edit** link next to the file you wish to edit.

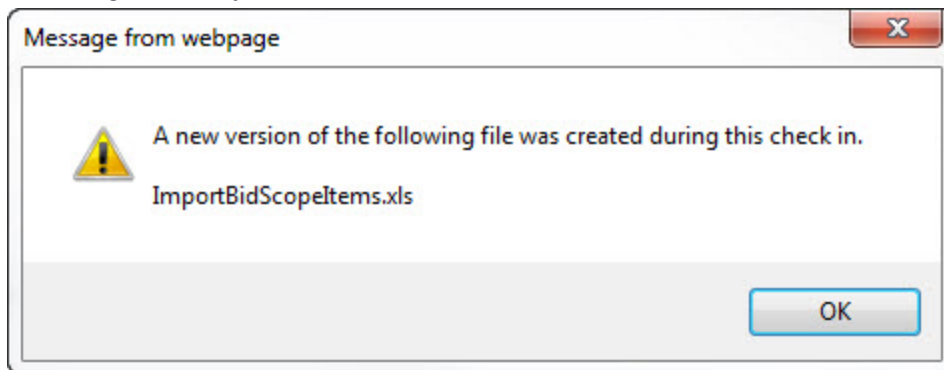
The file opens in its native application.

2. Make changes as necessary and remember to save along the way.

Note: You are able to navigate away from the document and e-Builder if necessary - your changes will be saved, as long as you save the file in its native application.

3. When your edits are completed and you're ready to check the file back into e-Builder, click **Check In** next to the file.

A message informs you that a new version of the file will be saved.



4. Click **OK**.

If document control is enabled, you are prompted to complete document custom fields.

5. If necessary, update document custom fields, click **Save**, and then **Close**.

Copy Document URL

A document's URL can be copied and then shared with internal project participants. Recipients will have to login to e-Builder to view the document if they are not already logged in.

To copy a document's URL

1. Go to the Project Documents page.
2. Click the file **Properties** link, located under the file name.
3. Click the **Copy to Clipboard** link just under the **File URL** field.
4. Share the URL on a Web page or paste it into your email or instant messaging tool to send it.

Update Document Custom Fields

This action can be completed by Administrators and users with Document Import permissions only.

Note: In order to tag documents with custom fields, the administrator must enable account-level document control and establish document custom fields per document type. The individual project must also have project-level document control enabled.

When all of these settings are in place, users will be automatically prompted to complete the document custom fields every time they upload a file to the Documents module. Tagging documents cannot be required, and users can bypass the custom field assignment.

To update document custom fields

1. Go to the Project Documents page.
2. Click the **Properties** link under the document file name.
3. Click the **Custom Fields** tab. The Custom Fields tab will not display if Project Document Control is not enabled.
4. Update the custom fields as necessary.
5. Click **Save**.

Import Document Custom Fields

This task can be completed by:

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

Prerequisite: Set Up Document Custom Field Import File

Document custom fields can be imported for multiple projects at a time. When document control is enabled on a project, participants are able to complete document custom fields at the time of upload. However, non-required fields may not always be entered. Also, administrators may feel more comfortable completing these fields to ensure consistency. Importing document custom fields is a great time-saving tool that allows you to manage these fields more easily.

To import document custom fields

1. Click **Documents** from the Top Navigation tabs.
2. In the Quick Links menu located in the upper right corner of the page, click **Import Document Custom Fields**.
3. Click **Browse** to search for and select the import file.
4. Click **Next**.
5. If necessary, map the e-Builder built-in fields to the corresponding fields in the import file.
To learn more, see Set Up Document Custom Field Import File.
6. Click **Next**.
7. Review the import summary. If there are exceptions, click **Previous** to make necessary changes.
—Or—
If there are not necessary changes, click **Import**.

Set Up Document Custom Fields Import File

Document custom field imports are compatible with Microsoft Excel® .xls and .xlsx files. A single import file can include custom fields for multiple projects. The distinction will be made by the value of the project identifier being used in the import file.

The image below includes the name of all fields that can be added to the header row of the spreadsheet. This image is also of the mapping step that will be encountered during the import.

If the headers in your file match these fields exactly, they will auto-populate. If the header names are different, you must map the corresponding columns in your spreadsheet to the e-Builder built-in fields in step 2 of the import wizard. The Document Custom Fields section lists all available document custom fields on the account. These field labels should also be column headers in the file.

Description of Required and Optional Fields for Import File

e-Builder Field Name/ Import File Column Header	Description	Required/Optional
Project Identifier	Select a Project Identifier. This is a unique ID that will identify which project the document custom field is associated with. Examples include project name and project number. To learn more about project numbers, see Create Project Number Custom Field.	Required
File Name	Include the name of the file exactly as it is saved in the Documents folder structure, including the file extension.	Required
Folder Path	Enter the folder path that the file the currently saved in, such as Documents/Construction/Specifications.	Required

e-Builder Field Name/ Import File Column Header	Description	Required/Optional
Description	Enter a description for the custom field value. Blank values will not change existing entries, however, new values will overwrite existing ones.	Optional
File Version	Enter the file's version number	Optional
Document Type	Enter the document type in this field. Blank values will not change existing entries, however, new values will overwrite existing ones.	Optional
Document Custom Fields	By default, all available document custom fields display on the Field Mappings page, as illustrated in the above image. Make the custom field labels, column headers and enter the desired value in the appropriate columns.	Optional

View Sent Items

You are able to see a list of messages that have been sent from the Documents module. These items include emails and notifications. You are able to narrow your search by filtering based on specific criteria.

To search for and view a list of sent items

1. Go to the Project Documents page.
2. In the Project Menu, click **Sent Items**.
3. Filter for messages.

Note: All sent items display by default, and you may not have to use the filter.

About Redlining Documents

Adding redline markups allow you to annotate the file. Redlining does not modify the actual file; it creates an overlay on top of it that exists only in e-Builder. After you save your redline and return to the Documents module, there's a counter under the file name that shows how many redline layers have been created for the document.

Tip

To view a redline markup outside of e-Builder, save the markup as a PDF or TIFF.

Guidelines for Redlining Documents

The Redline tool is intended for markups of small to medium sized PDF files. A general rule of thumb is to use files under 500 pages and under 250 MB. If your file does not open quickly and is near this size, we suggest splitting the PDF into two separate files and working from there.

Required Permissions





In order to:	You need these permissions:	Notes for Administrators:
Redline files	Redline Markup	Redline permissions can be granted for an individual file or folder.
View redlined files	View	

o

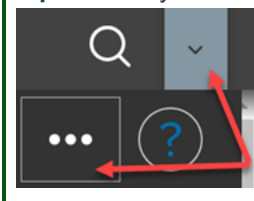
Redline Documents

Using the built-in redlining feature, you can redline documents. You can then save the redline markups to your local machine as a PDF or TIFF file. This is the only way to save redlined files and make them available outside of e-Builder. This also allows you to make marked up files available to team members who do not have permission to view redlined documents.

To redline documents

1. Go to the Project Documents page.
2. Navigate to the file you want to redline.
3. Click the **Redline** link located below the name of the file you wish to redline.
The file opens up in a separate redlining window.
4. Click the **Markup** icon  located in the upper left corner of the window.
5. Click **New Markup**.
6. From the Annotations drop down, select the type of markup you wish to make.
7. Once the document has been marked up, do any of the following:
 - o To save the file, click the **Markup** icon > **Save Markup**. Enter a unique name and then click **OK**.
 - o To save the file as a PDF, click the **More** icon  > **Publish to PDF**.
 - o To save the file as a TIFF, click the **More** icon  > **Publish to TIFF**.
 - o To print the file, click the **More** icon  > **Print**.


Tip: You may need to maximize the redlining window to see the **More** icon.



Note: Click the Help icon located on the upper right corner of the window. A new window displays the in-app help that describes all the options available on the redline window. Depending on your browser settings, your redline window may be 'hidden' behind the help window.

Open Redlined Documents

To open a redline document

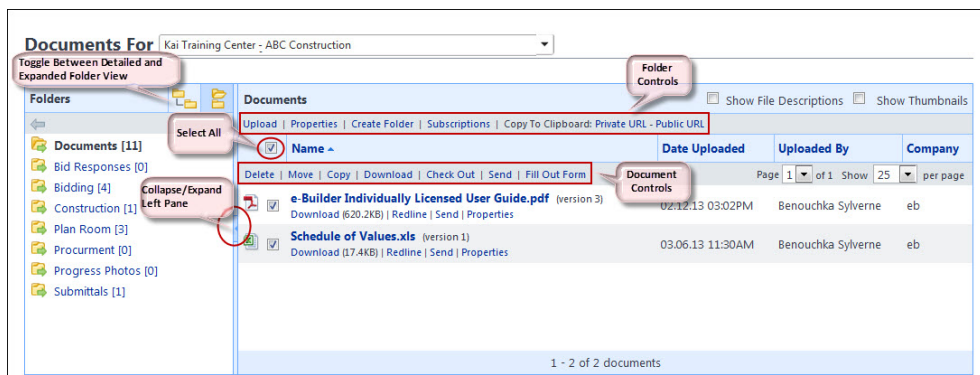
1. Go to the Project Documents page.
2. Navigate to the redline file you want to open.
3. Click the **Redline** link located below the file name.
The file opens in a separate window.
4. Click the **Markup** icon  located in the upper left corner of the window.
5. Click **Open for edit**.
6. From the **Available markup files** dialog box, select the version you wish to view.
7. *Optional:* Select the **Show first** check box and select an option from the list if you would like the viewer to automatically pre-load the first instance of this option when the markup is loaded (forwarding the document to that page). For example, if you only want to review signatures, and the first signature is on page 10 of the document, selecting the Signature option will load the markup file beginning with the signature item located on page 10.
8. Click **OK**.

Tip

If you save each of the redline versions as separate files in e-Builder, you will be able to compare at least two of the documents side by side. See Compare Documents for more information.

Document Folders

The Documents page is central to working with documents. The folder structure is located in the left pane. When you select a folder, it displays its contents in the adjacent content pane.



To access the Project Documents page

1. Click the Documents tab located on the top navigation tabs.

2. Choose a project from the **All Projects** menu.
The Project Documents page is displayed.

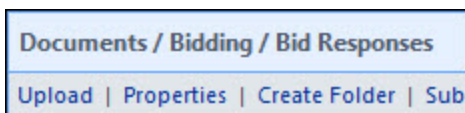
Folders

From each project's Documents folder, you can switch between the detailed and expanded folder views.

- **Expand All:** Expands all folders and subfolders.
- **Collapse All:** Collapses all folders and subfolders.
- **Refresh All:** Refreshes the items in the content pane.

Content pane

- **Folder Path:** The selected folder's path is displayed at the top of the content pane. Click the name of a folder within the folder path to open it.



- **Show File Description:** Shows the file descriptions on the content pane.
- **Show Thumbnail:** When this check box is selected, file thumbnails will be displayed. To avoid negative impacts on page loading performance when file thumbnails are enabled, e-Builder has limited the display of File Thumbnails to solely image file types with the following extensions:
 - png (Portable Network Graphic)
 - gif (Graphics Interchange Format)
 - bmp (Windows Bitmap)
 - jpeg (Joint Photographic Expert Group image)
 - jpg (Joint Photographic Expert Group image)

When File Thumbnails are enabled, other file extensions will not display thumbnails. However, the following file types will display a PDF, DOC, or XLS icon instead of a file thumbnail:

- pdf (Adobe Portable Document Format)
- doc (Microsoft Word)
- docm (Microsoft Word with macros)
- docx (Microsoft Word)
- dot (Microsoft Word template file)
- dotx (Microsoft Word template)
- xls (Microsoft Excel)
- xlsb (Microsoft Excel)
- xlsm (Microsoft Excel Macro-enabled)
- xlsx (Microsoft Excel)
- xlt (Microsoft Excel Template)

A generic icon will be displayed for other file types.

Folder controls

- **Upload:** Adds a new file to the selected folder.
- **Properties:** Views the selected folder properties.
- **Create Folder:** Creates a new folder inside the current folder.
- **Subscriptions:** Creates a folder subscription. Folder subscriptions allow you to set up email notifications when a change is made to the folder and its contents. For more information, see [Subscribe Yourself to Folders](#). If you are an Administrator, you can also [Subscribe Users to Folders](#).
- **Copy to Clipboard:** Copies the folder's web address for distribution to external users. To make this folder available for public access, you must choose a public access permission setting located in the properties of the folder. For detailed steps, see [Enable Folders for Public Access](#).
- **Private URL** - Copies the private URL. This allows you to send the folder path to an e-Builder user. If the recipient is not already logged into e-Builder, they'll be required to login in order to access the file.
- **Public URL** - Displayed if the folder is enabled for public access. Click to copy the URL to the clipboard.
- **Email Address** - Displayed if the folder is configured to accept email from external parties. Click to copy the email address to the clipboard. For instructions on configuring the folder to accept email, see [Email Enable Folders](#).

Folder Properties - General

This window is displayed when the folder "properties" link is selected on the Project Documents page. The General tab is highlighted by default.

From this page, you can take the following actions:

- Move folders
- Give Public Access to Folders
- Enable Folders for Public Access
- Email Enable Folders

Buttons

- **Save:** Click to save changes.
- **Move:** Click to move the folder to a different folder within the project's folder structure. Please note that moving folders does not create a duplicate, rather the folder is completely removed from its original location.
- **Delete:** Click to delete the folder. You are prompted for confirmation.
- **Cancel:** Click to discard changes and close this page. All unsaved changes will be lost.

Fields

- **Name:** Displays the name of the folder. This is also an editable field.
- **Description:** Displays a description of the file, if one exists. This is also an editable field.
- **Document Type:** Displays the document type selection for this folder. This can be defaulted by the administrator on the Custom Fields tab.

- **Folder URL:** Displays the folder's private web address. Recipients will need to login to e-Builder Enterprise™ in order to view folder contents.
- **Location:** Displays the folder path of the folder location.
- **Added By:** Displays the user that created the folder.
- **Date Added:** Displays the date that the folder was added.
- **Last Modified By:** Displays the name of the person that made changes to the folder last.
- **Date Modified:** Displays the date that the folder was modified.
- **Public Folder URL:** Displays only if the folder is public. Otherwise, Folder is not public displays. If enabled for public access, the public web address displays for you to provide external users folder access. For instructions, see Enable Folders for Public Access.
- **e-Builder Sync URL:** Displays the e-Builder sync URL that can be used to create a shortcut to this folder when transferring files using e-Builder Sync. e-Builder Sync allows you to transfer files between your local computer or network server and the e-Builder document structure. This field is displayed only if this feature is enabled for the account and project. Account administrators have the ability to enable this feature. For instructions, see Set up e-Builder Sync Options.
- **Public Access Permissions:** Click to select a public access permission setting. For instructions, see Give Public Access to Folders.
Choose from the following:
 - **No public access allowed:** (default selection)
 - **Allow access without registration**
 - **Require registration to access:** Select this option to require the recipient of the folder URL to create an e-Builder username and password in order to login to the system. You will then be able to view a list of all registered users by clicking the Public Access History tab: Registered Visitors tab, from this window. See Folder Properties Public Access History Tab for an overview of this page.
 - **Show public sub-folders on public view:** This check box is displayed when you choose to allow public access. Select this check box to also enable access to sub-folders.
- **Folder Access Options: Allow Email In:** Select to allow both internal and external users to email files to this folder. Three additional options display:
 - **Store entire email message:** Select this check box to store both the email and its attachments in this folder.
 - **Store attachments separately:** Select this check box to store attachments in the same folder, but as a separate item than the message.
 - **To send e-mails to this folder, use:** A default email address will populate in this field that may be edited, but it must be a unique name. This will be the email address for this folder.

Folder Properties - Custom Fields

This tab allows you to view and modify the folder's default document type and set default values for the custom fields.

This tab does not display if the Project Document Control has not been enabled on the Project Details Settings tab. The administrator must also establish document type and custom field associations.

From this tab, you also have the option to set custom fields to read only so that users cannot change the default value. Applying default values will apply them to all files currently in the folder.

If you would like to modify the custom fields for multiple files or folders at once, go to the Document Custom Fields page, where you can scroll through all the files in a given folder and specify the custom fields for each.

Fields and Buttons

The fields and buttons on this page are:

- **Save:** Click to save changes.
- **Cancel:** Click to discard changes and close this page. All unsaved changes will be lost.
- **Apply default values to all files within this folder?:** Select to apply the defaulted custom field values to all files within this folder.
- **Document Types:** Click to select a default document type for the files in this folder. Associated custom fields display in the Custom Fields section below. For instructions on establishing document type and custom field associations, see Associate Custom Fields with Document Types.
- **Custom Fields:** Displays the custom fields that are associated with the document type. Enter a value for each custom field.

Related Topics:

- Add Document Types
- Add Document Custom Fields

Folder Properties - History

The history log of a folder allows account and project administrators to see who accessed the folder, when it was accessed, and in what manner. Below is a description of the fields and buttons located on this page.

- **Name:** The name of the user who accessed the folder.
- **Company:** The company associated with the users who accessed the folder.
- **Timestamp:** The date and time that the folder was accessed.
- **Access:** The manner in which the folder was accessed.

Folder Properties - Permissions

This tab allows you to view and modify folder permission settings. When a document is uploaded, it inherits the parent folder's permission settings. Even though settings for individual files can be changed, it is not recommended. Folder permissions are role specific, and cannot be set for individual users. Add the roles you wish to specify permissions for, and then create your settings for each selection. For instructions, see View/ Edit Folder Permissions.

Note: If the role is not listed in the folder permissions, it means that the specific role does not have access to this folder. For instructions on granting a role folder access, see Add Account Roles to Folders.

To access the Folder Properties Permissions tab

1. Go to the Project Documents Page.
2. On the Project menu, click on the **Folder Permissions** link.
The Folder Permissions page is displayed.

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

Toolbar options

- **Apply:** Select one of the following options:
 - **Apply to folder:** Select to apply folder permissions to only the current folder.
 - **Overwrite existing (folder & subfolders):** Select to overwrite the current permission settings and apply folder permissions to sub-folders and their files.
 - **Apply changes (folder & subfolders):** Select to replace existing permissions in sub-folders with this folder's permissions for only the changes that we just made. If only one role was updated it will apply just that role to the files and sub-folders and will ignore every other role.
- **Add:** Click to open the Add Permissions window and select the account roles or users you want to set access rights for. For your convenience, you have the choice of specifying permissions on the Add Permissions window or on this page; the same permission check boxes are available on both.
- **Remove:** Click to remove the selected role from the list of roles below. This effectively removes restricts this role from having access to this folder.

Folder Permissions

- **Document Owner:** This role is displayed by default and refers to the person who originally uploaded the file. Users with Modify permission are able to change the permissions for this role, but by default, the Document Owner inherits the following permissions:
 - View
 - Download
 - Redline Markup
 - Modify
 - Version Control
 - Delete
 - Change Perms

Note: The Document Owner automatically inherits Version Control permission which will allow them to delete all versions of a file. Take careful consideration of the document owner's role before allowing them to maintain all of the default permission settings. For example, if an administrative assistant uploads an initial set of shop drawings, you may or may not want to give them the permission to delete all subsequent versions of those drawings.

- **Members List:** Click a user group or role link to open the Members window and view the members of the selected project role group.
- **View:** Select to allow users in the highlighted role permission to view this folder in this project and in all projects that the file is available in. (Any author or recipient of the file will be able to see the files they created/ received, regardless of this permission.)

Note: The permissions to the files can be changed on the file level by going to the File Properties Permissions Tab. The author of the file will always have full access.

- **Download:** Select to allow users in the highlighted role to download the file to a local storage in the native format that the file was uploaded in.
- **Redline Markup:** Allows users to redline files and compare documents.
- **Modify:** Allows users in the highlighted role to update the folder, document name and description.
- **Version Control:** Allows users in the highlighted role to check files in and out. This will allow them to create new versions of a file.

Note: For attached documents within processes, version control will always be enabled on the specified default folder, regardless of the step actor's permission levels.

- **Create:** Allows users in the highlighted role to upload files to this folder.
- **Create Folder:** Allows users in the highlighted role permission to create sub-folders.
- **Delete:** Assigning the Delete permission to the Document Owner, a User or Group will allow them to delete files that they created in that folder.
Assigning the Delete permission to an actual role will allow them to delete files (even those that they did not create) and the folder itself.
- **Change Perms:** Allows users in the highlighted role to update permissions for this folder.
- **Public Access:** Allows users in the highlighted role to configure a folder's public access settings. The users can make a folder public or private, require registration to access the folder or allow access to it without registration.
- **No Access :** This role has no access to this file. This permission overrides any other permissions the user may be granted.

Folder Properties -Subscribers

The Subscription tab allows you to manage folder subscriptions for yourself, and if you are an administrator, for others as well. You are able to complete the following tasks from this page:

- Subscribe yourself to Folders
- Unsubscribe yourself or users from folders
- Edit folder subscriptions for yourself
- Subscribe users to folders
- Edit folder subscriptions for users

Fields and Buttons

The fields and buttons located on this page are:

- **Subscribe:** Click to create the folder subscription.

Note: If you subscribe yourself to a folder, you're able to unsubscribe at any time, but if the subscription was created by an administrator, only the administrator can cancel your folder subscription.

- **Cancel:** Click to cancel and close this window. All unsaved changes will be lost.

- **Action:** Select the action that you want to take:
 - **Subscribe:** Select to create a folder subscription.
 - **Unsubscribe:** Select to unsubscribe the folder. This option is only available when you subscribe yourself or you are an administrator.
 - **Modify Subscription Type:** Select to make changes to the details of this subscription. This option is only available when you subscribe yourself or you are an administrator
- **Subscribers**
 - **Subscribe Myself:** Select to add yourself to the folder subscription.
 - **Available Subscribers:** Select the Roles, Groups, and/or individual users to add to the subscription. This option is available to Administrators only.
- **Subscription Type**
 - **Daily Summary:** Select to receive email that summarizes of activity of this folder daily.
 - **Instant Notification:** Select to receive an email notification as soon as any activity is taken on the folder.
- **Include Subfolders:** Select to include subfolders in the subscription.

Folder Properties -Recycle Bin

This tab is only visible to users with administrative permissions. The Recycle Bin tab lists all deleted files and folders and makes it possible to restore them. For instructions, see [Restore Deleted Documents](#).

Fields and Buttons

The fields and buttons located on this page are:

- **Restore:** Click to restore deleted items to their original location and status.
- **Cancel:** Click to close the window.
- **Name:** Displays the name of the deleted item.
- **Date Created:** Displays the date and time the item was created.
- **Date Deleted:** Displays the date and time the item was deleted.
- **Deleted By:** Displays the user's name that deleted the item.

Folder Properties - Public Access History

The Public Access History tab is only visible to users with administrative permissions. This tab allows you to view the access history of public folders. From this tab you're be able to see the person's name, time of access, and the contact information of all project participants that have ever accessed this folder. For instructions, see [View Access History of Public Folders](#).

Fields and Buttons

The fields and buttons located on this page are:

Access History Tab

This tab allows you to see the number of times this folder has been accessed.

- **Timestamp:** Displays the date and time the folder was accessed.
- **Company:** Displays the company name associated with the person that accessed the folder.
- **Name:** Displays the name of the person that accessed the folder.
- **Email Address:** Displays the person's email address.
- **Cancel:** Click to close this window.

Registered Visitors Tab

This tab displays the information of registered visitors.

- **Company:** Displays the company name associated with the person that accessed the folder.
- **Name:** Displays the name of the person that accessed the folder.
- **Email Address:** Displays the person's email address.
- **Cancel:** Click to close this window.

Import Folder Permissions Page

You are taken through a two step wizard when importing folder permissions.

A description of each step is below.

Note: For detailed steps see Import Folder Permissions.

Step 1

- **Remove permissions not in import file:** Select to remove existing permissions in e-Builder that are not in the import file.
- **Download Import Template (.xls):** Click to download a template of the import file to help you get started. The headers of your import file should include the following titles:
 - Folder Path
 - Group, Role, or User
 - View
 - Download
 - Redline Markup
 - Modify
 - Create
 - Create Folder
 - Delete
 - Change Perms
 - No Access
- **Browse:** Click to select the import file.
- **Next:** Click to go to the next step of the import process after all fields have been completed.
- **Cancel:** Click to cancel the import and return to the Folder Permissions page.

Step 2 (Review)

- **Preview Tab:** This tab is displayed by default and allows you to review the details of the import; whether it was successful or not. The number of rows imported appears on the tab name.
- **Exceptions Tab:** Lists details of all errors, if any. Click the **Export Exceptions** button to export details to a spreadsheet.
- **Warnings Tab:** Lists all warning messages, if any. The Warnings tab lists information additional permissions that might be inherited.

Working with Folders

You can perform the following actions on folders:

Create Folders

Note: You need to be an administrator or have Modify permissions to perform this task. For more information, see Edit Folder Permissions.

To add folders to the Documents folder structure

1. Go to the Project Documents page.
2. Click the **Create Folder** link.
3. To make this a sub-folder, click the **Change Folder** link in the Parent Folder field.
4. On the **Select a folder** dialog box, select the parent folder for this new folder.
5. Complete all necessary fields.
6. Click **Save**.
7. On the Folder Properties window, optionally perform the following actions:
 - Enable Folder for Public Access
 - Edit Folder Permissions
 - Subscribe Yourself to the Folder
 - Subscribe Users to the Folder (Administrators only)
8. Click **Save**.

Move Folders

All folders except the Documents folder can be moved.

To move folders

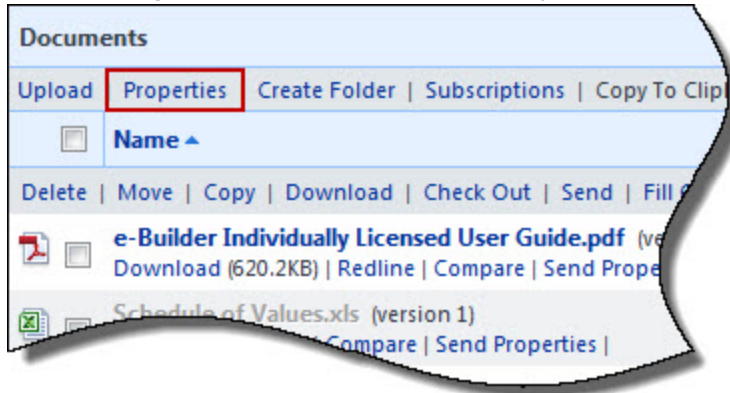
1. Go to the Project Documents page.
2. Click the folder that you wish to move.
3. Click the **Properties** link.
4. On the Folder Properties General Tab click **Move**.
5. Select a destination for the folder.
6. When prompted to confirm, click **OK**.

Enable Folders for Public Access

Administrators have the ability to provide public access to e-Builder folders. Once these settings are established, a public folder URL becomes available for distribution.

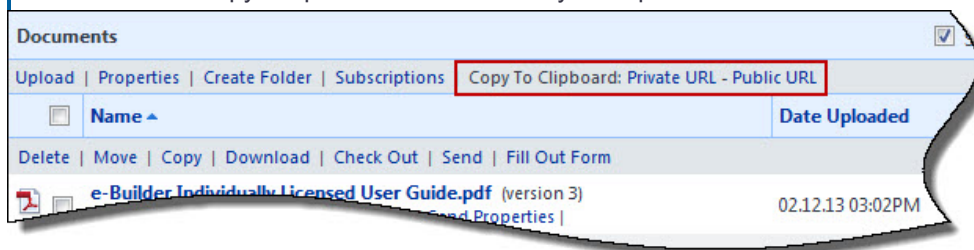
To make a folder public

1. Go to the Project Documents page.
2. Click the name of the folder you want to make public.
3. Click the **Properties** link underneath the folder path.



4. Click the **Public Access Permissions** drop-down arrow and select a public access option. The following options are available:
 - No public access allowed (default selection)
 - Allow access without registration
 - Require registration to access - Select this option to require the recipient of the folder URL to create an e-Builder username and password in order to login to the system. You will then be able to view a list of all registered users by clicking the Folder Properties Public Access History Tab.
5. *Optional:* You can choose to enable sub-folders for public view as well by clicking the **Show public sub-folders on public view** check box.
6. Click **Save**.
7. If you chose to include sub-folders, confirm this change by selecting the **Apply this setting to all sub-folders** check box.
8. Click **Save**.

Note: After the folder is made public, a Public URL link displays in the section underneath the folder name. Click this link to copy the public web address to your clipboard for distribution.



Tip

To view the public web address, click the Properties link. The web address is listed in the Public Folder URL field.

Related Topics:

- Send Public Folder URL to External Users
- Folder Properties - General Tab Page Overview

Send Public Folder URL to External Users

In order for a folder to have a public URL available, it needs to first be enabled for public access. For instructions, see Enable Folders for Public Access.

To send a folder's URL to external project participants

1. Go to the Project Documents page.
2. In the Copy To Clipboard field, click the **Public URL** link.
The URL is copied to your clipboard.
3. Paste the URL (CTRL + V) in the appropriate location for sending.

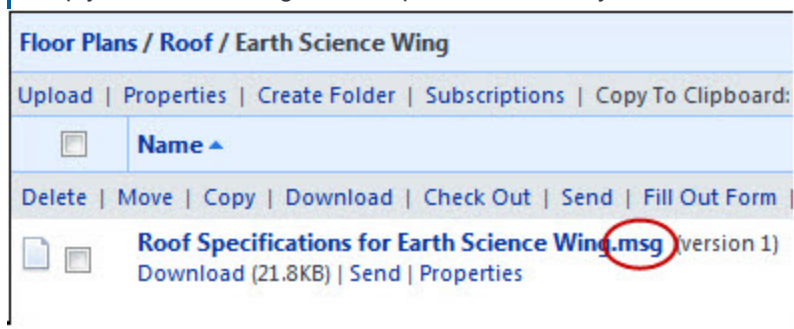
Related Topics:

- Project Documents Page Overview

Email Enable Folders

Administrators and users with Change Permission have the ability to enable folders to receive email messages from both internal and external project participants. Once this setting is configured, an email address is automatically generated for the folder. You are able to view, and if necessary, edit this email address to a unique name. Messages appear in the folder as a .msg extension.

Note: Microsoft Outlook® is required to download and open message files outside of e-Builder Enterprise™. Simply click the message title to open it within the system.

**Tip**

Set up a folder subscription so that you are notified when an email has been sent to this folder. You will also be notified of all other updates to the folder.

To email enable folders

1. Go to the Project Documents page.
2. Click the folder's **Properties** link.
The Folder Properties - General Tab displays.
3. In the **Folder Access Options** field, select the **Allow Email In** check box. Additional options are displayed.
4. Select the **Store entire email message** check box to store emails in e-Builder, along with their attachments.

Note: The attachment will still be accessible within the message. If opened in Outlook, it will be an attachment. If opened in e-Builder Enterprise™, it can be accessed from the Attachments tab

5. Select the **Store attachments separately** check box to save attachments as a separate file within the folder.

Note: This option stores the attachments only. The email message file is not retained.

6. The default email address is displayed in the **To send e-mails to this folder, use:** field. This field is editable. Change the email address as necessary.
7. Click **Save**.

Folder Subscriptions

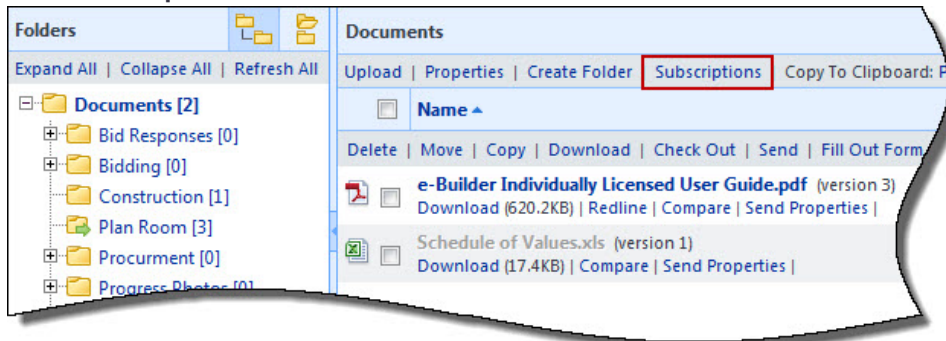
You can perform the following actions on folder subscriptions:

Subscribe Yourself to Folders

Subscribing yourself to a folder allows you to receive email notifications whenever the folder's contents have been updated. If you are an account or project administrator, you can also subscribe account roles, groups or individual users; for more information, see [Subscribe Users to a Folder](#).

To subscribe yourself to a folder

1. Go to the Project Documents page.
2. Select the folder you want to subscribe to.
3. Click **Subscriptions**.



4. Select a subscription type.

- An **instant notification** will send you an email whenever a new file is uploaded to the folder, a new version of a file is created, a file is deleted, or if a file is redlined.
 - A **daily summary** will send you a recap of everything that has happened during the previous day.
5. To include subfolders to the subscription, select the **Include Subfolders** check box.
 6. Click **Subscribe**.

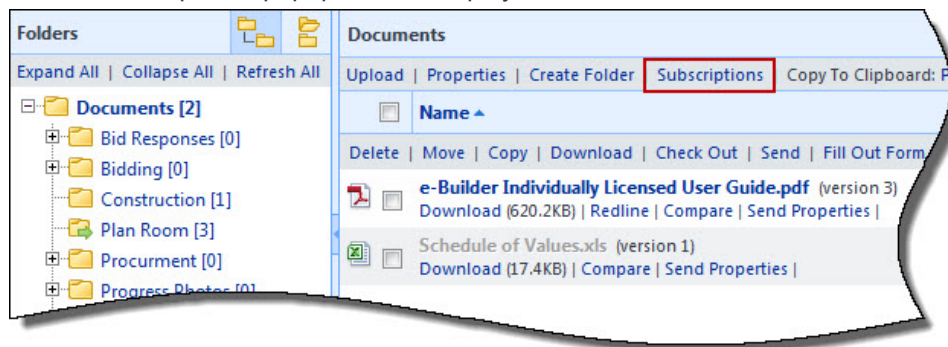
Unsubscribe Yourself From Folders

Note: If your folder subscription was created by an Administrator, only an Administrator can unsubscribe you from the folder. You are able to unsubscribe yourself only if you created the subscription.

To unsubscribe yourself from a folder

1. Go to the Project Documents page.
2. Select the folder you want to unsubscribe from.
3. Click **Subscriptions**.

The Folder Properties popup window displays with the Subscriber tab selected.



4. Select the **Unsubscribe** radio button.
5. To unsubscribe from subfolders as well, select the **Include Subfolders** check box.
6. Click **Unsubscribe**.

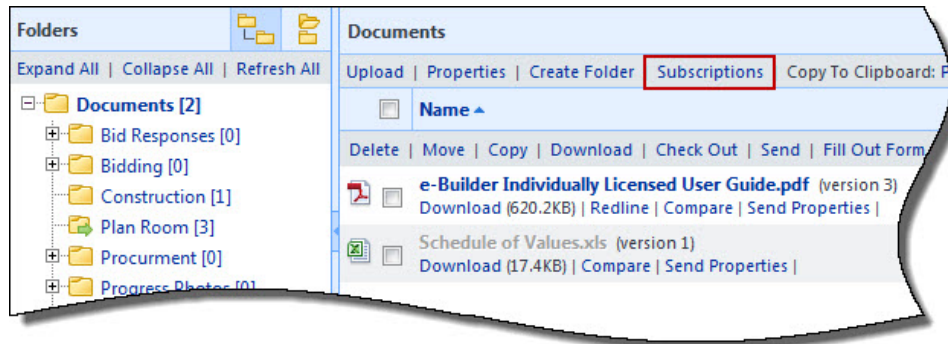
Edit Personal Folder Subscriptions

There are two types of folder subscriptions; instant and daily, and you have the choice to select one or both. Instant subscriptions send an email notification just as soon as there is any activity in folder. Daily subscriptions will send you a daily email. You can also modify the subscription to include or remove subfolders.

To edit folder subscriptions

1. Go to the Project Documents page.
2. Select the folder you want to modify subscriptions for.
3. Click **Subscriptions**.

The Folder Properties popup window displays with the Subscriber tab selected.



4. You can take any of the following actions:

- To change the subscription type, select the **Daily Summary** and/or **Instant Notification** check box.

Note: An instant notification will send you an email whenever a new file is uploaded to the folder, a new version of a file is created, a file is deleted, or if a file is redlined. A daily summary will send you a recap of everything that has happened during the previous day.

- To include subfolders, select the **Include Subfolders** check box.

5. Click **Subscribe**.

Folder Permissions

You can perform the following actions on folder permissions:

View Folder Permissions

Note: You need to be an administrator or have Change Permission privileges to perform this task. For more information, see Edit Folder Permissions.

To view folder permissions

1. Go to the Project Documents page.
2. Click **Folder Permissions** located in the Project Menu.
The Folder Permissions page displays.
3. Navigate to the folder you want to view permissions for.

Export Folder Permissions

Exporting the folder permissions gives you a digital copy that can be distributed, printed, or saved and then modified to be imported back into e-Builder.

To export folder permissions

1. Go to the Project Documents page.
2. From the Project Menu, click **Folder Permissions**.
3. Click **Export**.
The Select Output Type menu displays.

4. Select **Print View** for a printable version of the file, which cannot be imported back into e-Builder.
—Or—
Select **Excel Data Export** for a file version that can be modified and imported back into e-Builder.
5. Click **Export**.

Import Folder Permissions

Folder permissions can be imported to reduce the time it takes to make these changes manually. A template file is available on the Import Folder Permissions page to help you get started. Likewise, you can export the current folder permissions to make the necessary changes and then import this file to update these settings in e-Builder.

Note: The import supports only .xls or .xlsx files.

Below is an example of the headers that should be included in your import file.

	A	B	C	D	E	F	G	H	I	J	K
	Folder Path	Group, Role, or User	View	Download	Redline Markup	Modify	Create	Create Folder	Delete	Change Perms	No Access
2	Fall Lakes \	Accounting	X	X	X	X					
3	Fall Lakes\	Approver	X	X	X	X					
4	Fall Lakes \	Architect	X	X	X	X					
5	Fall Lakes \ 01 Internal Only \	e-Builder Admin	X	X	X	X	X	X	X	X	
6	Fall Lakes\ 01 Internal Only \	Members	X								
7	Fall Lakes \ 01 Internal Only \	Project Manager	X	X	X		X				
8	Fall Lakes \ 01 Internal Only \	Senior Bid Manager	X	X	X	X					
9	Fall Lakes \ 01 Internal Only \ 00 Miscellani	Accounting	X	X	X	X					

To import folder permissions

1. Go to the Project Documents page.
2. From the Project Menu, click **Folder Permissions**.
3. Click **Import**.
The Import Folder Permissions page is displayed.
4. Click **Browse**.
5. Search for and select the import file.
6. Click **Next**.
7. Review the import file summary.
8. If available, review any warnings by clicking the **Warnings** tab.
9. If there are no exceptions, click **Import**.

—Or—

If there are exceptions, click the **Exceptions** tab to review what they are. Make the necessary changes to the import file, and then click **Previous** to import the updated file.

Add Account Roles to Folders

To specify unique permissions for account roles, they must first be added to the folder. The Project Administrator and Project Member groups are added to each folder by default.

Note: You need to be an administrator or have Change Permission privileges to perform this task. For more information, see Edit Folder Permissions.

To add account roles to a folder

1. Go to the Project Documents page.
2. Click the Folder **Properties** link.
3. Click the **Permissions** tab.
4. Click the **Add** link.
5. In the Account Roles section, select the check box next to the account roles you want to add.
6. In the **Select Which Permissions To Grant** section, select the type of access to grant the selected users.
For a description of these access types, see Folder Properties Permissions Tab Overview.
7. Click **Add**.

Tip

Ensure that all users in the selected account role(s) are those that need the permission level that you have granted. To do so, from the Folder Properties - Permissions tab, select the account role, and then click the **List Members** link. A pop-up window displays with a list of the member in the selected account role.

Add Individual Users to Folders

To specify unique permissions for individual users, they must first be added to the folder. The Project Administrator and Project Member groups are added to each folder by default.

Note: You need to be an administrator or have Change Permission privileges to perform this task. For more information, see Edit Folder Permissions.

To add folder permissions for individual users

1. Go to the Project Documents page.
2. Click the Folder **Properties** link.
3. Click the **Permissions** tab.
4. Click the **Add** link.
5. Select the **Show Users** check box.
A filter displays, which allows you to filter for the users you want to add. A list of project users also display, which you can access by scrolling beneath the fold.
6. In the Project Users section, select the check box next to the user(s) you want to add.
7. To set permissions for the user at this time, select the appropriate access type(s) in Select Which Permissions To Grant section. For a description of these access types, see Folder Properties Permissions Tab Overview.
8. Click **Add**.

Edit Folder Permissions

Note: You need to be an administrator or have Change Permission privileges to perform this task.

Folder permissions can only be modified for existing groups and individual users that have been added to the folder.

[To edit folder permissions](#)

1. Go to the Project Documents page.
2. Click **Folder Permissions** located in the Project Menu.
The Folder Permissions page is displayed.
3. Click the **Edit** link next to the folder you want to edit permissions for.
The permission check boxes are enabled.
4. Select the check boxes of the permissions you want to assign and clear the check boxes of the permissions you want to remove.
5. Click the **Save** link.

Tip

Click the folder name to view a description of each permission type. The Folder Properties - Permissions tab displays. You are also able to modify the permissions from this tab. For additional explanation on the permissions levels, see Folder Properties Permissions Tab Overview.

Administrative Tasks

Certain folder management tasks are available only to users with Admin permission.

Folder Permissions Page

Note: You can only update permissions for roles that already have folder access. You cannot add a new user role from this page.

The Folder Permissions page allows you to view and modify permission settings for each folder in the Documents folder structure. Additionally, the entire folder structure can be exported, and then reimported into e-Builder in order to update project folders permissions. From this page, permissions are set for administrators, members, roles or individual users.

To access the Folder Permissions page

Note: Administrators: To grant users the ability to perform this task, give them Change Permissions privileges. For instructions, see Edit Folder Permissions.

1. Go to the Project Documents page.
2. Click **Folder Permissions** located in the Project Menu.

Below is a description of the fields and buttons located on this page.

- **Folder Permissions For:** Click to view folder permissions for a different project.
- **Import:** Imports folder permissions. From here you're able to download a template file.
- **Export:** Exports the current folder structure and permissions. You're able to select from two output types: Print View and Excel Data Export. The print view is more aesthetic and is used for distribution. The Excel Data output can be modified and then imported back into e-Builder.
- **Also apply to files:** Select to apply the folder permissions to the individual files as well.

Warning: The Apply action is the only way to save changes to folder permissions. If you navigate to another folder without applying changes, a warning message will be displayed. However, if you navigate away from this page, your changes will be lost.

After setting the desired folder permissions, click this drop-down arrow to select how to apply the permissions. Choose from the following options:

- **Apply to folder** - Applies changes to the selected folder only.
 - **Overwrite existing (folder & subfolders)** - Overwrites subfolder permissions to match the selected folder's permissions. This option will remove any conflicts between the selected folder and its subfolders to match the selected folder exactly.
 - **Apply changes (folder & subfolders)** - Select to apply changes only. This option will not overwrite existing permissions - it will only apply changes that you've made to the folder and/or subfolders.
- **Add:** Adds account roles and project groups to the list of roles that has been given permission.
 - **Remove:** Removes the selected roles or groups from the list.
 - **Group, Role, or User:** This column lists the groups and roles that can be given folder access.
 - **View:** Allows users to view the folder and the files within the folder.
 - **Download:** Allows users to download files.
 - **Redline Markup:** Allows users to redline files and compare documents.
 - **Modify:** Allows users to edit the folder name and description. This permission also allows users to move files from the folder.
 - **Create:** Allows users to upload files.
 - **Create Folder:** Allows users to create sub-folders within the current folder.
 - **Delete:** Allows users in the role or user group to delete files and folders, regardless of who created it. Users without delete permission can only delete the files that they uploaded. Allows Document Owners to delete their own files in that folder. They cannot delete other files or the folder itself.
 - **Change Perms:** Allows users in the selected role to change folder permissions.
 - **No Access:** Select to override all other permissions. If someone is in two roles and one of the roles has this permission, selecting this check box will override all other role permissions for the user.

Add Account Roles to Folders

To specify unique permissions for account roles, they must first be added to the folder. The Project Administrator and Project Member groups are added to each folder by default.

Note: Administrators: To grant users the ability to perform this task, give them Change Permissions privileges. For instructions, see Edit Folder Permissions.

To add account roles to a folder

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. Click the Folder **Properties** link.
The Folder Properties General Tab displays.

3. Click the **Permissions** tab.
The folder's permission settings displays.
4. Click the **Add** link.
The Add Permissions window displays.
5. In the Account Roles section, select the check box next to the account roles you want to add.
6. In the Select Which Permissions To Grant section, select the type of access to grant the selected users.
For a description of these access types, see Folder Properties Permissions Tab Overview.
7. Click **Add**.

Tip

Ensure that all users in the selected account role(s) are those that need the permission level that you have granted. To do so, from the Folder Properties - Permissions tab, select the account role, and then click the **List Members** link. A pop-up window displays with a list of the member in the selected account role.

Related Topics:

- Add Individual Users to Folders
- Edit Folder Permissions

Add Individual Users to Folders

To specify unique permissions for individual users, they must first be added to the folder. The Project Administrator and Project Member groups are added to each folder by default.

Note: Administrators: To grant users the ability to perform this task, give them Change Permissions privileges. For instructions, see Edit Folder Permissions.

To add folder permissions for individual users

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. Click the Folder **Properties** link.
The Folder Properties General Tab displays.
3. Click the **Permissions** tab.
The folder's permission settings displays.
4. Click the **Add** link.
The Add Permissions window displays.
5. Select the **Show Users** check box.
A filter displays, which allows you to filter for the users you want to add. A list of project users also display, which you can access by scrolling beneath the fold.
6. In the Project Users section, select the check box next to the user(s) you want to add.

7. To set permissions for the user at this time, select the appropriate access type(s) in Select Which Permissions To Grant section.

For a description of these access types, see Folder Properties Permissions Tab Overview.

8. Click **Add**.

Related Topics:

- Add Account Roles to Folders
- Edit Folder Permissions

Edit Folder Permissions

Folder permissions can only be modified for existing groups and individual users that have been added to the folder. For instructions on adding users to the folder, see the Related Topics section below.

To edit folder permissions

1. Go to the Project Documents Page.
2. On the Project menu, click on the **Folder Permissions** link.
The Folder Permissions page is displayed.
3. Click the name of the folder you want to edit permissions for. The permission check boxes are displayed on the right side.
4. Select the check boxes for the permissions you want to assign and clear the check boxes of the permissions you want to remove.
5. Click the **Apply** button.

Tip

Click the folder name to view a description of each permission type. For additional information on the permissions levels, see Folder Properties Permissions Tab Overview.

Related Topics:

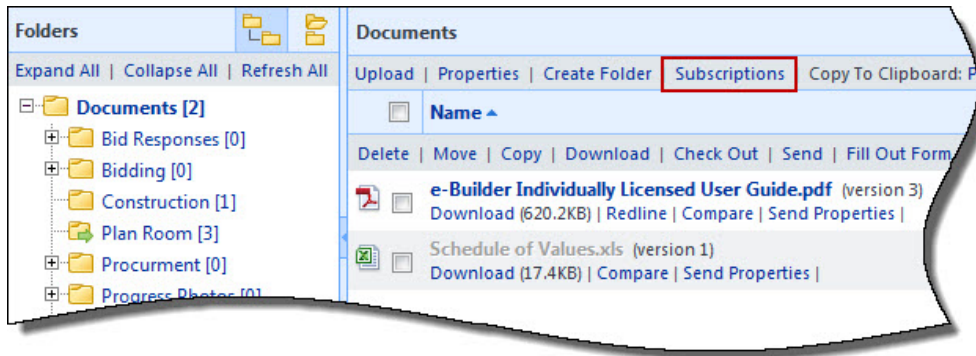
- Add Account Roles to Folders
- Add Individual Users to Folders

Subscribe Users to Folders

Subscribing to a folder enables users to receive email notifications whenever the folder's contents have been updated. Account and project administrator have the ability to subscribe account roles, groups and individual users.

To subscribe users to a folder

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. Select the folder you want to subscribe the user to.
3. Click **Subscriptions**.
The Folder Properties popup window displays with the Subscriber tab selected.



4. Select the account roles, groups or individual users you'd like to subscribe, and then click the right arrow to add them to the Selected Subscribers box.
5. Select a subscription type.
 - An **instant notification** will send you an email whenever a new file is uploaded to the folder, a new version of a file is created, a file is deleted, or if a file is redlined.
 - A **daily summary** will send you a recap of everything that has happened during the previous day.
6. Select the **Include Subfolders** check box to add subfolders to the subscription.
7. Click **Subscribe**.

Related Topics:

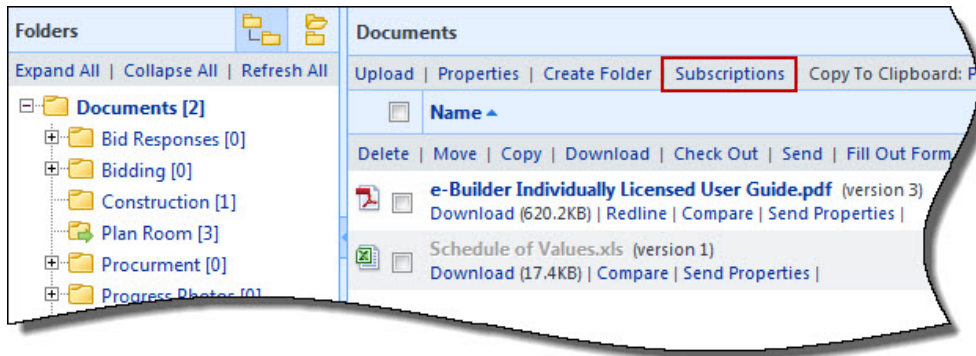
- Unsubscribe Users From Folders
- Edit Folder Subscriptions for Users

Unsubscribe Users From Folders

Note: If you create folder subscriptions for your team members, only yourself and other administrators will have the ability to unsubscribe those users; team members will not be able to unsubscribe themselves.

To unsubscribe team members from a folder

1. Go to the Project Documents page.
For more information, see [Access Project Documents Page](#).
2. Select the folder you want to unsubscribe users from.
3. Click **Subscriptions**.
The Folder Properties popup window displays with the Subscriber tab selected.



4. Select the **Unsubscribe** radio button.
5. In the **Subscribers** section, select the check box next to the account roles, groups or individual users you d like to unsubscribe.
6. To unsubscribe from subfolders as well, select the **Include Subfolders** check box.
7. Click **Unsubscribe**.

Related Topics:

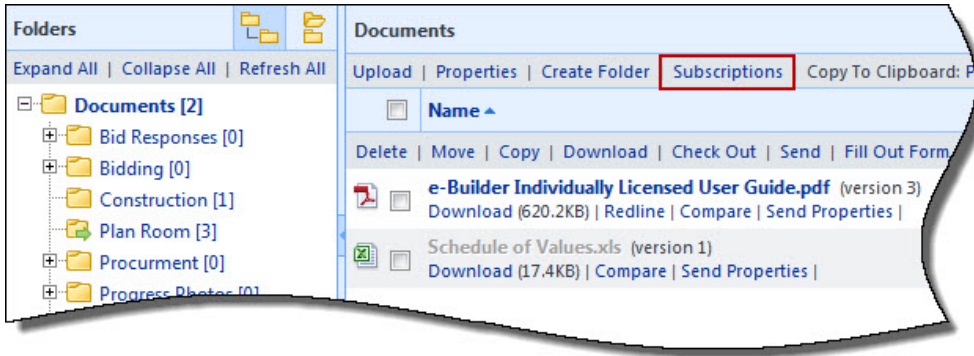
- Unsubscribe Users From a Folder
- Edit Folder Subscriptions for Users

Edit Folder Subscription for Users

There are two types of folder subscriptions; instant and daily, and you have the choice to select one or both. Instant subscriptions send an email notification just as soon as there is any activity in folder. Daily subscriptions will send you a daily email. Additional modifications can be made by adding/ removing yourself from the subscription, modifying the subscribers list or including/ removing subfolders.

To edit folder subscription for team members

1. Go to the Project Documents page.
For more information, see Access Project Documents Page.
2. Select the folder you want to modify the subscription for.
3. Click **Subscriptions**.
The Folder Properties Subscriber window is displayed.



4. You can take any of the following actions:

- To subscribe yourself, select the **Subscribe Myself** check box.
- To add or remove groups, roles or individuals, click the appropriate directional arrow to move users to the appropriate box.
- To include subfolders, select the **Include Subfolders** check box.
- To change the subscription type, select the **Daily Summary** and/or **Instant Notification** check box.

Note: An instant notification will send users an email whenever a new file is uploaded to the folder, a new version of a file is created, a file is deleted, or if a file is redlined. A daily summary will send a recap of everything that has happened during the previous day.

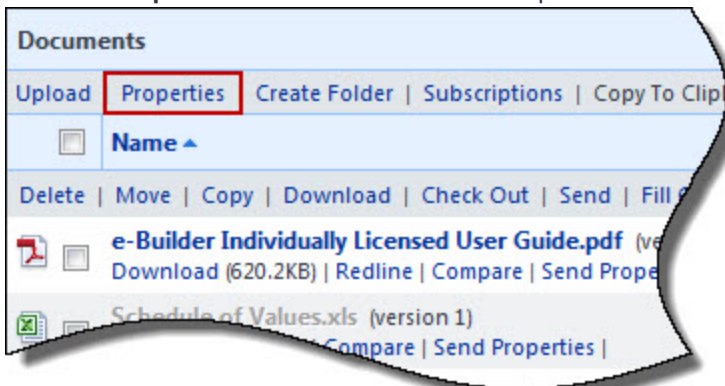
5. Click **Subscribe**.

Restore Deleted Documents & Folders

When users delete folders or documents, they are not permanently removed from the system and can be restored by anyone with administrative permissions.

To restore deleted files and folders

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. Click the **Properties** link underneath the folder path.



The Folder Properties window displays.

3. Click the **Recycle Bin** tab.
4. Select the check boxes of the files and folders you want to restore.
5. Click **Restore**.

Related Topics:

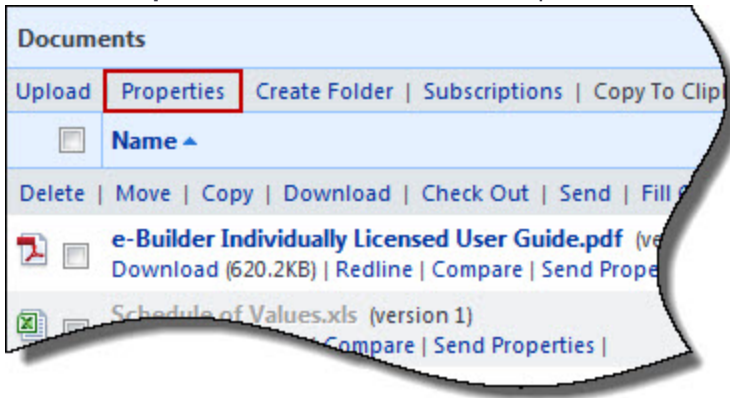
- Find Deleted Documents
- Folder Properties Recycle Bin Tab Overview

View Access History of Public Folders

Only users with administrative privileges are able to view the access history of public folders.

To view the access history of public enabled folders

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. Click the **Properties** link underneath the folder path.



The Folder Properties window displays.

3. Click the **Public Access History** Tab.

View Document Access History

Only administrators are able to view a document access history. A document's access history tells you exactly who accessed files including the date and time they were opened.

To view a document's access history

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. In the Project Menu, click **Access History**.
The Access Document History page displays.
3. Filter for file(s).

Tip

To view all files, do not add any filter criteria and click Filter.

4. *Optional:* You can also export the document access history log to an Excel™ spreadsheet by clicking the Excel icon.

Related Topics:

- Access Document History Page Overview

View/Export Document Log

Only administrators are able to view and export the document log. The following is a list of data included in the document log:

- Folder path
- File name
- File size
- User that uploaded the file
- Redline Counter and link to redlined file
- User that currently has the file checked out
- Date file was checked out
- Link to a list of items the file is attached to

To view or export the document log

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. In the Project Menu, click **Document Log**.
The Document Log page displays.
3. To export these records, click **Export**.
The Select Output Type submenu displays.
4. Choose from one of the following options:
 - Excel Data Export
 - CSV Data Export
 - Tab Delimited Text
5. Click **Export**.

Related Topics:

- Document Log Page Overview

Find Deleted Documents

Only users with administrative permissions are able to search for deleted documents.

To find deleted files

1. Go to the Project Documents page.
For instructions, see [Access Project Documents Page](#).
2. In the Project Menu, click **Find Deleted Documents**.
The Find Deleted Documents window displays.
3. In the **Search for** field, enter the name of the file, include the file extension, that you want to search for.
4. Narrow your search by selecting one or more of the Search in options.
5. Click **Search**.

Related Topics:

- [Delete Documents](#)
- [Restore Deleted Documents and Folders](#)
- [Find Deleted Items Page Overview](#)

Update Folder Custom Fields

Only users with administrative permissions can perform this task. Updating folder custom fields enable folder contents to automatically inherit the custom field values of the parent folder.

Note: In order to tag documents with custom fields, the administrator must enable account level document control and establish document custom fields per document type. The individual project must also have project level document control enabled.

When all of these settings are in place, users will be automatically prompted to complete the document custom fields every time they upload a file to the Documents module. Tagging documents cannot be required, and users can bypass the custom field assignment.

To update folder custom fields

1. Go to the Project Documents page.
For instructions, see [Access Project Documents Page](#).
2. Click the folder **Properties** link.
The Folder Properties General Tab displays.
3. Click the **Custom Fields** tab. This tab does not display if Project Document Control is not enabled.
4. Select a **Document Type** from the drop-down list. The custom fields that have been defined for this document type will display.
5. Click the custom field drop-down arrow for the values that you want to apply to the new documents uploaded to this folder.
6. Check **Read Only?** if users should not be able to change the value.
7. Check **Apply default values to all files within this folder** to modify existing files in the folder.
8. Click **Save**.

Related Topics:

- [About Document Custom Fields](#)
- [Update Document Custom Fields](#)

- Review Folder and Document Custom Fields
- Enable Project Document Control

Review Folder and Document Custom Fields

You can view folder and document custom fields by accessing the properties of each individual folder or file. However, to view custom fields for multiple files or folders, it is best to do so from the Document Custom Fields page for a more efficient process.

Note: All users are able to view this page, but only users with administrative privileges are able to view and update folder custom fields. The Custom Fields menu option does not display if the Project Document Control has not been enabled.

To view folder and document custom fields

1. Go to the Project Documents page.
For instructions, see [Access Project Documents Page](#).
2. In the Project Menu, click **Custom Fields**.
The Document Custom Fields page displays.
3. Select the folder or file you want to view custom fields for.
The custom fields display in the content pane.

Note: If you do not see expected files or folders, deselect the **Show untagged files only** option at the top of the folders pane.

4. Optionally, you can make changes to custom field values, and then click **Save** to commit changes.

Related Topics:

- [About Document Custom Fields](#)

About Equipment Items

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

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

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

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

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

About Equipment and Cost Integration

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

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

Related Topics:

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

Access Equipment Items Page

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

To access the Equipment Items page

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

Import Equipment List

This task can be completed by:

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

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

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

The following sets of information are included below:

- Required Fields for Import File
- Import Equipment List

Required Fields for Import File

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

Import Equipment List

To import the equipment list

1. Go to the Equipment Items page.
For instructions, see Access Equipment Items Page.
2. Click the **Import Equipment Items** link located in the upper right-hand corner.



The Import Equipment List page is displayed.

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

Add Individual Equipment Items

This task can be completed by:

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

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

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

To add equipment items

1. Go to the Equipment Items page.
For instructions, see Access Equipment Items Page.
2. Click **Add Item**.
3. Complete all necessary fields.
4. Click **Save**.

Related Topics:

- Add Equipment Item Details Page Overview

Update Date Required on Job

This task can be completed by:

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

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

To update the date required on job

1. Go to the Equipment Items page.
For instructions, see Access Equipment Items Page.
2. Select the item(s) whose dates you would like to update.
3. Click **Update Dates**.
The Date Required on Job - Update dialog box displays.
4. In the **Date Required** field, enter the date that items are required to be installed.
5. *Optional:* Enter a note about this deadline and/or installation in the **Date Required Note** field.
6. Click **Update**.

Related Topics:

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

Equipment Items Page Overview

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

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

Fields and Buttons

The fields and buttons located on this page are:

Filter Equipment Items

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

- **Item Name:** To filter for a specific equipment item, enter the name of the item in this field.
- **Manufacturer:** To filter for equipment items made by a particular company, enter the name of the manufacturer in this field.
- **Department:** To filter for specific receiving departments, enter the name of the department that would have received the item in this field.
- **Ship to:** To filter for a specific location, enter the address or location that items were shipped to.
- **Budget Line:** To filter for equipment items that are tied to a particular budget line item, click this drop-down arrow to make a selection.

- **Commitment Number:** To filter for equipment items that are tied to a particular commitment, enter the commitment number in this field.
- **Model:** To filter for a particular model, enter the model name or number in this field.
- **Vendor:** To filter for equipment items distributed by a particular vendor, enter the name of the vendor in this field.
- **Room Number:** To filter for equipment items sent to or stored in a particular room, enter the room number in this field.
- **Date Required On Job:** To filter for equipment items that are required to be installed by a certain date, enter the date range in these fields.
- **Associated To Commitment Item:** To filter for equipment items that are associated to or excluded from a commitment item association, click the drop-down arrow and select yes or no.
- **Commitment Status:** To filter for equipment items that are associated to a commitment of a particular status, click this drop-down arrow to select the status to filter by.
- **Clear:** Click to clear the filter.
- **Filter:** Click to filter by entered criteria.

Equipment Items

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

Note: This option is only available if the project is NOT configured to use an external. equipment management tool. See About Equipment and Cost Integration for more information.
- **Delete Item:** Click to delete selected equipment items.

Note: This option is only available if the project is NOT configured to use an external. equipment management tool. See About Equipment and Cost Integration for more information.
- **Update Dates:** Click to update the date that equipment items are required to be installed at the job site for selected equipment items. If multiple items have an identical Date Required on Job date, select these items and then click this button.

Note: This option is only available if the project is NOT configured to use an external. equipment management tool. See About Equipment and Cost Integration for more information.
- **Item Number:** This column displays the item number. Click the item number to open the Equipment Item Details page.
- **Item Name:** This column displays the name of the item. Click the item name to open the Equipment Item Details page.
- **Model:** This column displays the item's model name and/or number.
- **Manufacturer:** This column displays the manufacturer's name.
- **Department:** This column displays the department the item was delivered to.
- **Room Number:** This column displays the room number that the item was delivered to.
- **Date Required on Job:** This column displays the date that the item is required to be installed at the job site.

- **Need by Date:** This column displays the date by which the item should be received.

Add Equipment Item Details Page

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

Fields and Buttons

The fields and buttons located on this page are:

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

Details

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

Pricing Details

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

Delivery Details

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

Custom Fields

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

For more information, see About Equipment and Cost Integration.

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

About Forms

Forms are customizable, electronic input screens used to record specific data elements. Your account administrator can create any number of forms necessary to support your internal business processes. Forms are created according to business processes and may be routed to various team members or roles on your projects. Workflow forms can be routed to a number of different user roles, across organizations, and externally to non-e-Builder users as well. Unlike paper forms, electronic forms in e-Builder allow you to check on the status of forms, including whose court the form might be in, by simply logging into e-Builder and going to the Project Forms page. This enhances communication among team members, as there is little room for error. Due dates, comments, attachments, requests, and field information are all easily accessible by all parties involved in a form's life cycle. Form data and usage information can also be pulled into reports by anyone who has access to the form.

Types of Forms

There are two form types available in e-Builder:

- **Static Forms (Non-Routable):** Static forms are one-way communications to team members, often communicating the procedural information status of specific items. Static forms are mainly for informational purposes. Team members can be notified of static postings using the copy (CC) functionality, but static postings are not routed.

Examples of static forms include:

- Daily Log Reports
 - Accident Reports
 - Field Observations
 - Warranty Trackers
- **Workflow Forms (Routable):** Workflow forms are routed communications to team members, used when a specific response is necessary from the recipient(s). For example, Workflow forms are used to send someone an item that requires approval or a written answer to a question. Workflow forms use the ball in court mechanism to indicate who is currently responsible for taking action on an item. When the form is in your court, you can edit the data fields in the form and then send the form on to the next person in the route. The form will then land in the next person's court. When a workflow is initiated, the recipient and all users cc'd receive e-mail notification of the posting and all subsequent activity on the workflow.

Examples of workflow forms include:

- Transmittals
- Field Reports
- Submittals
- Design Reviews
- Addenda
- Project Issues
- Requests For Information
- Change Orders
- Architectural Supplemental Instructions
- Punch Lists
- Daily Inspections
- Contract Approvals

Access the Forms Page

You are able to view forms across your account and also within a project.

To access forms if you are not in a project

1. Click the **Forms** tab located on the Top Navigation Tabs.
2. Choose a project from the **All Projects** menu.
The Project Forms page is displayed.
3. Use the filter to search for your forms.

To access forms if you are in a project

1. Click the **Forms** link located in the Project Menu.
The Project Forms page is displayed.
2. Use the filter to search for your filter.

Working with Forms

Your security permission will determine the actions that you are allowed to perform with forms.

- **Related topics**

Import Form Instances

Depending on your account settings, you may or may not be able to import forms. The Forms import capability must be enabled by an e-Builder Support team member. For more information, please contact your account manager. Once the option is available, only users with Import permissions can perform this task.

Importing forms allow you to import form instances of a particular form type. This helps administrators save time by eliminating data entry efforts. Imports can be of new or existing forms. For existing forms, simply add the project name, form counter and field details.

Example

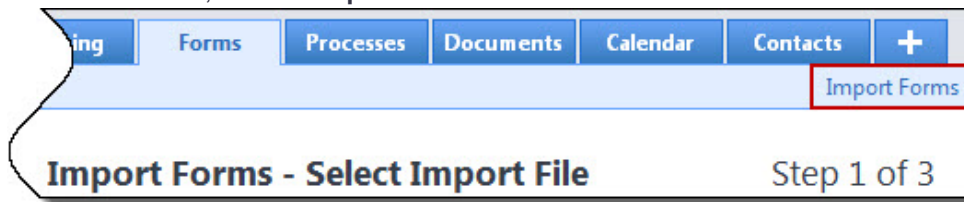
e-Builder built-in fields are mapped to the columns of your Excel® spreadsheet. The columns in your import file do not have to match the e-Builder built-in fields exactly, but if they do, the data will automatically populate on the Field Mappings page and you will not have to physically map the fields. All of the built-in fields do not have to be included your import file, but at a minimum, the required fields do. This includes required custom fields as well.

Sample import file of the Action Item form type:

	A	B	C	D	E	F	G	H
1	Project Identifier	Subject	Author	Held By	Priority	Date Created	Name of Requestor	Date of Request
2	Delray Commons	Fire Extinguishers	Sutton, Andy	Wiley, Mathia	Normal	02.01.2011	Mathia Wiley	02.01.2011
3	Delray Commons	Plumbing Isometrics Do not coincide with required codes	Sutton, Andy	Wiley, Mathia	Normal	05.20.2011	Mathia Wiley	05.20.2011
4	Delray Commons	Need More Information	Sutton, Andy	Wiley, Mathia	Normal	06.13.2011	Mathia Wiley	06.13.2011
5	Delray Commons	Emergency Doors	Sutton, Andy	Wiley, Mathia	Normal	06.13.2011	Mathia Wiley	06.13.2011
6	Delray Commons	Counter Tops	Sutton, Andy	Wiley, Mathia	Normal	06.13.2011	Mathia Wiley	06.13.2011
7	Delray Commons	Removal of Old Carpets	Sutton, Andy	Wiley, Mathia	Normal	06.13.2011	Mathia Wiley	06.13.2011

To import form instances

1. Open the Forms page.
2. On the Forms tab, click the **Import Forms** link.



The Import Forms page is displayed.

3. Complete the required fields.
For an overview of this page, see Import Forms Page Overview.
4. Click **Next**.
5. Complete the required fields.
6. Map the fields to the columns in the Excel file.
7. Click **Next**.
8. If the file was mapped correctly and there aren't any exceptions or warnings, click **Import**.

—Or—

If there are exceptions, the **Import** button will be disabled.

- a. Click the **Exceptions** tab to review the exceptions and make necessary changes to the spreadsheet.
 - b. Click **Previous** twice to return to Step 1 and then re-import the file.
9. Click **Finish**.

Fill Out Forms

To initiate a workflow form or fill out a static form

1. Go to the Forms page.
2. Open the form you wish to fill out.
3. Complete the required fields.

For a description of this page, see Fill Out Form Page Overview.

Note: Be sure to click through the tabs at the bottom of page, as they might contain required or optional form fields that are not readily apparent.

4. Do any of the following actions:
 - Post the form. An e-mail notification is sent to the recipients of workflow forms and CC'd users of a static form.
 - Save the form as a draft. Draft forms display as a workflow in your court.

Edit Forms

Opened and draft forms can be edited. Also, only some fields can be edited.

To edit a form

1. Go to the Forms page.
2. On the form you wish to edit, make the necessary changes.

For a description of the fields and buttons on this page, see View/Edit Form Page Overview.

3. Do any of the following actions:
 - Post the form. An e-mail notification is sent to the recipients of workflow forms and CC'd users of a static form.
 - Save the form as a draft. Draft forms display as a workflow in your court.

Comment on Forms

Comments can only be added to open and closed forms, but not forms in draft status. However, an administrator can disable comments from being added on a closed form. Additionally, adding comments is one of the only ways to attach a form to forms that have already been posted.

To comment on a form

1. Go to the Forms page.
2. Open the form you wish to comment on.

3. Click the **Comments** tab.
4. Click **Comment**.
5. *Optional:* Attach files and/or forms:

Note: The only way to add comments to posted forms is by adding a comment or forwarding the form. You cannot attach forms to posted forms by clicking the Attach Forms tab as you would a draft form.

6. Enter your comment.
7. Click **Add Comment**.

The comment is added to the form.

Reply to Forms

You are only able to reply to forms that are in your court. By default, when accessing the project's Forms page, a view of the workflow forms in your court is displayed. If you are on the Project Forms page, use the filter to for workflow in your court'.

To reply to forms

1. Go to the Forms page.
2. Open the form you want to reply to.
3. Complete the required fields.
4. Click **Reply**.

Forward Forms

You have the ability to forward forms that are currently in your court or those that you have initiated.

To forward forms

1. Go to the Forms page.
2. Open the form you want to forward.
3. Complete the required fields.
4. Click **Forward**.
5. Select the recipient or role that you'd like to send the form to.
6. Click **Send**.

Re-open a Closed Form

To re-open a closed Form

1. Go to the Forms page.
2. Open the form you want to re-open.
3. Complete any required field.
4. Click **Re-Open**.
5. *Optional:* Reset the due date.

Note: The "Notify all participants that form is being re-opened." check box is selected by default. Clear this check box if you do not want to notify participants.

6. Click **Re-Open Form**.

A status and confirmation message is displayed.

7. Click **Continue**.

Request External Comments

To allow a non-e-Builder license holder to respond to a form, you must request an external comment from them. External comment requests can be requested by email. The message will include the form's detailed information and all attached documents. Recipients will respond through a link in the email. You will be notified via email and this request will also continue to appear in your court until the form is closed.

To request an external comment via email for a new form

1. Go to the Forms page.
2. Click **Fill Out Form**.
3. Select the form you wish to fill out.
4. Enter all required fields.
5. Select the **Request External Comment After Posting** check box.
6. Click **Post Form**.

The Request External Comment dialog box is displayed.

7. Select **Email** and then click **Next**.
8. Complete the required fields.

Tip

When sending an email, use your keyboard to auto-fill and select the desired email addresses. Begin typing the recipient's name or email address then use the arrows to highlight the email of choice, and then click **Tab** to make the selection.

9. Click **Email Request**.

To request an external comment via email for a form that has already been posted and in your court

1. Go to the Forms page.
2. Click the **Comments** tab.
3. Click **Request External Comment**.
The Request External Comment dialog box is displayed.
4. Select **Email** and then click **Next**.
5. Complete the required fields.

Tip

When sending an email, use your keyboard to auto-fill and select the desired email addresses. Begin typing the recipient's name or email address then use the arrows to highlight the email of choice, and then click **Tab** to make the selection.

6. Click **Email Request**.

View Forms

View Form / File Attachments

To view form attachments

1. Go to the Forms page.
2. Open the form that contains the attachment you wish to view.
3. To view file attachments, click the **Attached Files** tab.
4. To view form attachments, click the **Attached Forms** tab.

View Form History

A form's history reveals the users that have viewed, commented and made changes to a form [instance] between the time the form was created and closed. This data insures accountability, should tracking or auditing be necessary. You also have the ability to print a record of the history or export the data to an Excel® spreadsheet.

To view a form's history

1. Go to the Project Forms page.
For more information, see [Access the Forms Page](#).
2. Open the form you wish to view.
3. Click the **History** tab.
4. Optionally, you can take any of the following actions:
 - Click **Print** to print the history record.
 - Click the Excel icon to export the record to Microsoft Excel®.

View Form Field History

A form's field history reveals the users that have modified form fields between the time the form was created and closed. This data insures accountability, should tracking or auditing be necessary. You also have the ability to print a record of the form field history or export the data to an Excel® spreadsheet.

To view a form's field history

1. Go to the Project Forms page.
For instructions, see [Access the Forms Page](#).
2. Filter for the form.
3. Click the subject of the form.
The Form Instance page displays.
4. Click the **Form Field History** tab.
5. Optionally, you can take any of the following actions:
 - Click **Print** to print the history record.
 - Click the Excel icon to export the record to Microsoft Excel®.

View Form Permissions

Viewing the permissions of a form allows you to see the roles and individual users that have access to the form, and what their level of access is.

To view the permissions of a particular form

1. Go to the Project Forms page.
For more information, see [Access Project Forms Page](#).
2. Filter for the form.
3. Click the subject of the form.
The Form Instance page displays.
4. Click the **Permissions** tab.

Attach Files / Forms to Draft Forms

Follow the steps below to attach files or forms to draft forms.

Note: The only way to attach a form to a posted form is by adding a comment, replying or forwarding the form.

Tip

In IE 10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise.

To attach documents to a draft form

1. Go to the Forms page.
2. Open the form to complete or click **Fill Out Form** to open a new form instance.
3. To attach files, click the **Attached Files** tab.
4. Click the **Attached Files** tab.
5. Click **Attach Files**.
6. To upload a file from your computer:
 - a. Click **Upload from your Computer**.
 - b. Select a destination folder and click **Select**.
 - c. Click **Browse** to search for files to upload or drag and drop a file from your computer.
 - d. Click **Done**.
7. To select a file from the project's Documents module:
 - a. Click **Select from Documents Module**.
 - b. Select the file(s) and click **Attach**.

To attach forms to a form

1. Go to the Forms page.
2. Click the **Attached Forms** tab.
3. Click **Attach Forms**.
The Attach Forms page is displayed.

4. Filter for the forms you want to see.
Results are displayed in the table below.
5. Select the check box next to the forms you want to attach.
6. Click **Attach**.

Remove an Attached File or Form

The user who attached the form / file, an administrator or anyone with a manage forms permissions can remove attached files or forms.

To remove an attached file from a form

1. Go to the Forms page.
2. Filter for and then select a form.
The Forms Instance page is displayed.
3. Click the **Attached Files** tab.
4. Select the check box next to the form you want to remove, and then click **Remove Files**.
The word 'Removed' is displayed in parentheses next to the file name indicating that this file was removed from the form.

Note: You're able to reattach the same file by clicking the **Reattach** link located underneath the title of the file.

To remove an attached form from a form

1. Go to the Forms page.
2. Filter for and then select a form.
The Forms Instance page is displayed.
3. Click the **Attached Forms** tab.
4. Select the check box next to the form you want to remove, and then click **Remove Forms**.
The word 'Removed' is displayed in parentheses next to the file name indicating that this file was removed from the form.

Note: You're able to reattach the same file by clicking the **Reattach** link located underneath the title of the file.

Print Forms

There are two ways that a form instance can be printed in e-Builder; using standard printing or a mail merge template.

Print Forms Using Standard Printing

The standard printing option should be used if you want to print a single form instance and do not wish to use a mail merge template, or print any of the attachments.

To print a form instance

1. Go to the Forms page.
2. Filter for and select the form you'd like to print.

3. Click **Print**.

A preview of the form is displayed in a separate dialog box.

4. Click **Print**.

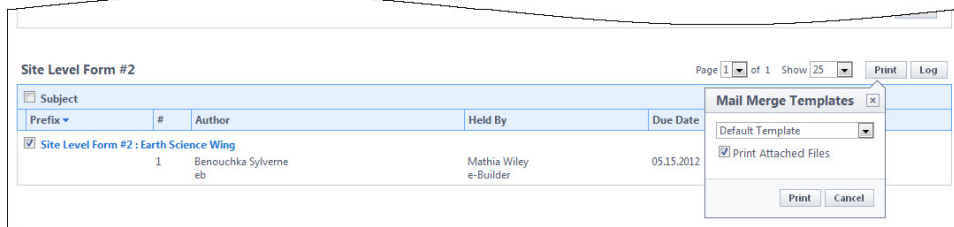
Print Forms Using Mail Merge

Mail merge printing allows you to print multiple forms of a single form type at a time. This option allows you to print using a mail merge template as well as print the attached files.

Note: The Print and Log buttons display only when a specific form type is selected.

To print forms using mail merge

1. Go to the Forms page.
2. In the **Filter Forms** section, click the **Type of Form** drop-down arrow and select a form type.
3. Click **Filter**.
4. Select the check box next to the form you want to print.



5. To print only high level information, click **Log**.

—Or—

To print form details and/or attachments, click **Print**. The Mail Merge Templates submenu is displayed.

6. Click the drop-down arrow and select a template.
7. To print the attached files, select the **Print Attached Files** check box.
8. Click **Print**.

Related Topics:

- Add/Edit Form Mail Merge Templates

Forms Page Overview

The Forms page is displayed when the Forms tab is selected on the Top Navigation Tabs. Forms on this page correlate to the selected view.

From the Forms page, you can:

- **Views:** Click to select a view.
- **Edit:** Click to open the Edit View page and make changes to the selected view.

- **Add View:** Opens the Add View page to create a new view.
- **Close Selected Form:** Click to close selected forms. Displays only for views that include open forms.

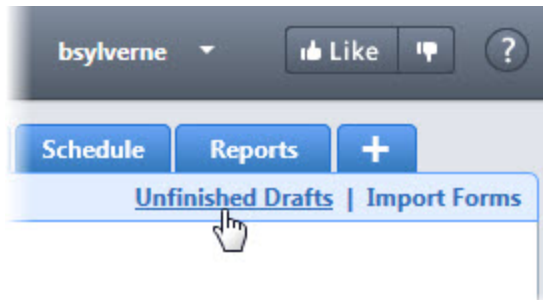
- Related topics

Project Forms Page

Project forms are displayed on this page. If you are a member of multiple projects, click the 'Forms for' dropdown to switch between your projects. From this page, you are able to search for, view and fill out project forms. If you are displaying forms of multiple statuses, you will notice that closed, open, and draft forms display differently on the results table. This is to help you quickly identify form statuses at a glance.

Quick Links

- **Unfinished Drafts:** Located in the Quick Links menu in the upper right corner of the page.



Everyone is able to see their own draft forms. To see the drafts of others, you must have View Draft permission, which is granted at the account level per role. Account and project administrators are also able to view draft forms by default. Those with Create permissions automatically inherit View Draft permission. Draft forms can be viewed from the Unfinished Drafts page and from Project Forms.

- **Import Forms:** Depending on your account settings, you may or may not be able to import forms. The Forms import capability must be enabled by an e-Builder Support team member. For more information, please contact your account manager. Once the option is available, only users with Import permissions can perform this task.

Fill Out Forms

- **Fill Out Selected Form Type:** Displays only when there is a selection in the Type of Form field. Click to fill out the selected form type.
- **Fill Out Form:** Click to open the Fill Out Form page and select the type of form you want to complete.

Filter Forms

The filter has a number of components to help you find the forms you're looking for.

- **Search In:** These options help you narrow search results. Search for forms that you've initiated, those in your court or both.

- **Type of Form:** Click to filter for all form types or specific workflow or static forms by name. If a status option is selected in combination with the All option, you will filter for all forms of the selected status. If a status is not selected, All will filter for all forms of every status that you have the permissions to see.
 - **Draft:** Only users in roles with View Draft permissions, account and project administrators are authorized to see draft forms. Draft forms can also be managed from the Unfinished Drafts page.
 - **Open:** Only users/roles with View permission, account and project administrators are authorized to filter for open forms.
 - **Closed:** Only users/roles with View permission, account and project administrators are authorized to filter for closed forms.

For more information, see Form Type Permissions Page Overview.

- **Containing Text:** Enter text to search for keywords located in the form details, such as the name, subject or field descriptions.
- **Filter:** Click to filter for select criteria.

Results Table

The title of the results table will change depending on the form type that is selected in the filter.

- **Page/Show:** Click to select the page number of results to jump to. / Click to select the number of results to display per page.
- **Print:** Prints form details and / or attachments.
- **Log:** Prints only high level information.

Note: Data opens in a Microsoft Word® or PDF document, as specified by the account or project administrator. You are able to print using the default template or a custom template if one has been created. See Add/Edit For Mail Merge Templates.

- **Subject:** : Displays the subject of the form. Click to open the form instance in a separate window, and view or take action on the form.
- **Prefix:** Displays the prefix of the form if one exists. A prefix is an additional identifier by which to track and access forms. An example is the contractor's tracking number.
- **#:** Displays the form instance number. This field allows you gauge how often a form type is being used.
- **Author:** Displays the name of the person who created the form.
- **Held By:** Displays the name of the person whose court the form is in.
- **Due Date:** Displays the date a workflow form is due. NA is displayed for static forms, as they do not have a due date.
- **Status:** Displays the amount of days before or after the workflow form is due in relation to the due date. Due dates will skip weekends & exceptions depending on the calendar exceptions.

Fill Out Form Page

This dialog box is displayed when you fill out a form. If you are presented with a list of workflow forms, select one from the list.

For more details on how to access the Fill Out Form page, see [Fill Out Forms](#).

Toolbar Buttons

- **Post Form:** Click to send the form to select recipients.
- **Save Draft:** Click to save a draft. Drafts forms can be retrieved by filtering for Forms in your court on the Forms and Project Forms page.
To learn more about managing draft forms, see [View Draft Forms Permission](#).
- **Delete Draft:** This button is only available for account administrators, the form initiator and users with the permissions to access draft forms. For more information on managing draft forms, see [View Draft forms permission](#).

Note: For a description of each of the common toolbar buttons, see [Toolbar Buttons](#).

Field Description

- **Project:** Displays the name of the project you are filling out this form for.
- **Project Number:** Displays the project number, if available.
To learn more or for instructions, see [Create Project Number Custom Field](#).
- **Form Type:** Displays the type of form you are filling out.
- **Author:** Displays the name of the person that created the form.
- **Counter Prefix:** Displays the prefix of the form if one exists. A prefix is an additional identifier by which to track and access forms. An example can be a contractor's tracking number.
- **Priority:** Click to select the priority level of the form.
- **Subject:** Enter the subject of the form.
- **Send To:** Displays for workflow forms only. Click to select the recipient.
- **Date Due:** Displays for workflow forms only. Click the calendar icon and select the date that this form should be completed by. You can also type the date in the field.
- **CC:** Select the roles or users to copy on the form. Click the right directional arrow to add users/ roles to the adjacent CC box.

Tip

Double-click the role name to view the list of users in the role.

- **Request external comment after posting:** Select to request a comment from an external recipient who is not a licensed e-Builder user. External comment requests can be sent via Email. For instructions, see [Request External Comments](#)

Tabs

The Attached Files and Attached Forms tabs are displayed by default, but additional tabs are sections of the form and are created by the account administrator.

- **Attached Files:** Click to view or attach files to the form.
- **Attached Forms:** Click to view or attach forms to the form.
- **Attached Viewpoints:** Click to view or attach viewpoints to the form. You might choose to attach viewpoints as supporting information.

Form Instance Page

The Form instance page is displayed when you view an open or closed form. The title of the form is at the top of the page with the instance number appended to the end of it.

Edit Form

Toolbar Buttons

- **Save:** Available only to open forms. Saves any changes.
- **Close:** Closes an open form.
- **Re-open:** Reopens an open form.
- **Copy:** Creates a copy of the form. The new form is displayed and is placed in draft status as a workflow in your court.
- **Fill out form:** Select a new form type to fill out.
- **Post Form:** Sends the form to select recipients.
- **Save Draft:** Saves a draft of the form. Draft forms can be retrieved by filtering for forms in your court on the Forms and Project Forms page.

Form Details

- **Project:** The name of the project you are filling out this form for.
- **Project Number:** The project number, if available. Administrators can decide whether or not to display project numbers. For more information, go to Administration Tools > Projects > Project Settings.
- **Form Type:** The type of form you are viewing or editing.
- **Author:** The name of the person that created the form.
- **Counter Prefix:** The prefix of the form if one exists. A prefix is an additional identifier by which to track and access forms. An example can be a contractor's tracking number.
- **Priority:** The form's priority level.
- **Subject:** The subject of the form. This field is editable for open forms.
- **Date Due:** For closed forms only. Not available for static forms. Click the calendar icon and select a due date. You can also type the date in this field.
- **Date Closed:** For closed forms only. Displays the date and time that the form was closed.

Tabs

The following tabs are displayed by default. Additional tabs are sections of the form created by the author.

- **Comments:** View comments, add comments, or request external comments. All actions that have been taken on the form are also listed on this tab.

- **Attached Files:** View or attach files to the form.
- **Attached Forms:** View or attach forms to the form.
- **Attached To:** Lists the forms that this form is attached to, if any.
- **Meeting Minutes:** Available only if the form was included in a meeting minute. Click to view or open event details.

History

A list of every view and action taken in the particular form instance. This information can be used for auditing and tracking purposes.

Form Field History

Displays a list of the changes made to the form's fields, users that made the changes, and a time stamp of when the change was made. This information can be used for auditing and tracking purposes.

Permissions

Displays the permission settings of the form. This tab is visible to all users. If necessary, administrators can change the permission to all form instances. For more information, see [Form Type Permissions Page Overview - Apply permissions to existing forms check box](#).

Import Forms Page

Note: Depending on your account settings this page may or may not be available to you. The Forms import capability must be enabled by an e-Builder Support team member. For more information please contact your account manager.

You are taken through a three step wizard when importing forms. A description of each page is below.

For detailed steps or to view a sample import file, see [Import Forms](#).

Step 1 of 3

- **Project Identifier:** Select a Project Identifier. This is a unique ID that will identify which project the form import is for. Project identifiers are entered into e-Builder as required project custom fields. For multiple options, the **Do not allow duplicates** check box must be selected on the Edit Custom Fields page.
- **Project:** Select a project to be used as a template project. Choose a project that includes the form type that you are importing. The import file can include multiple projects. The field below (Form Type) will update with the form types available for the selected project.
- **Form Type:** Select the form type you wish to import.
- **Import as Draft:** Select to import the file as a draft.
- **Send notification to held by users for open forms:** Select to send a notification to users that currently have this form type in their court, letting them know that additional forms of the selected type are going to be added.
- **Browse:** Click to select the import file.

Step 2 of 3

This step maps the fields in your spreadsheet to the default form built-in fields in e-Builder. For each required and optional built-in field, click the drop-down arrow and select the corresponding field in the spreadsheet. If the column names in your spreadsheet are identical to the built-in fields, they will populate automatically.

Step 3 of 3

- **Preview:** Review the details of the import, whether it was successful or not. If there were errors, details are displayed on the Exceptions tab.
- **Exceptions:** Lists all errors, if any. Click the Export Exceptions button to export details to a spreadsheet.
- **Warnings:** Lists all warning messages, if any.

Unfinished Drafts Page

This page allows account administrators and users with the appropriate permissions to see and take action on draft forms and processes. Draft processes and forms are created for many different reasons. At times, team members do not remember to use a draft process and create a new one. Co-workers who are unable to see the draft processes/forms of others do not know that the draft exists and submits a new process for the same item.

Everyone is able to see their own draft forms, but to see the drafts of others, you must have View Draft permission, which is granted at the account level per role. Account and project administrators are also able to view draft forms by default. Those with Create permissions automatically inherit View Draft permission. You are also able to filter for draft forms from the Project Forms page.

Note:

Permission settings to view drafts are located in the properties of the form and process. For more information, see:

- View Draft Forms Permission
- View Draft Processes Permission

Field-level descriptions for this page are located below:

- **Show:** Use this filter to narrow the results in the table below it. All Processes/Forms are selected by default. Make a selection to see drafts for a specific process/form.
- **Show All:** Click to show drafts for all forms/ processes.
- **Project Name:** The name of the project associated with the draft form/process.
- **Form Type:** The name of the form type.
- **Process Type:** The name of the process type.
- **Created By:** The name of the person who created the draft form/ process.
- **Date Created:** The date the draft was created.
- **Type:** Displays whether the form is a workflow or static form. Workflow forms are routable and facilitate two-way communication. Static forms cannot be routed, they are used mainly to disseminate information. To learn more, see About Forms.

About the Plan Room

The plan room is more than a document repository. Viewing documents in the plan room gives you quick and easy access to related files. In the plan room, files are indexed according to various attributes, which facilitates the accessibility of similar documents, reducing search efforts.

For example, files may be indexed by the document type *drawings* with the following attributes:

- Trade = Architectural
- Floor = Basement
- Division = 01 General Requirements

This gives you multiple ways to find the file: by document type, trade, floor or division.

In the plan room, documents with similar attributes are grouped together, further reducing search efforts. Once a document is selected it opens in the plan room viewer where related files with similar attributes can also be found in the Related Documents sections and Jump-To menus. For more information about the plan room viewer, see Plan Room Viewer Overview.

Related Topics:

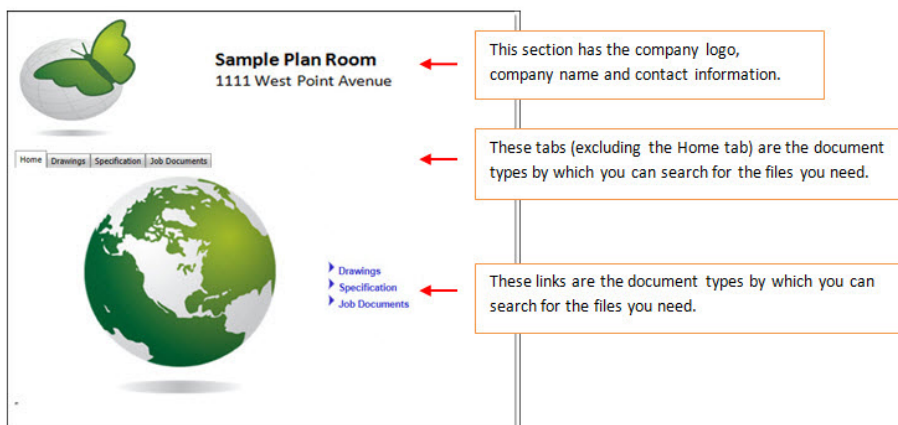
- Plan Room Overview
- Open Files in the Plan Room
- Plan Room Viewer Overview

Plan Room Overview

By default the Home tab is selected when you log in to the plan room. Company information and logo are located at the top of the page. The tabs are document types by which you can search for the files you need. These same document types reappear as links along the side of the picture in the illustration below.

Click the document type to see a list of all available files. If groupings are defined, you are able to expand categories and view groupings that will help you further narrow your options. Drill down to the file name and click the link to open the document in the plan room viewer.

Note: The data in this illustration is provided as an example of how a plan room may be setup. Actual content may differ from the illustration below.

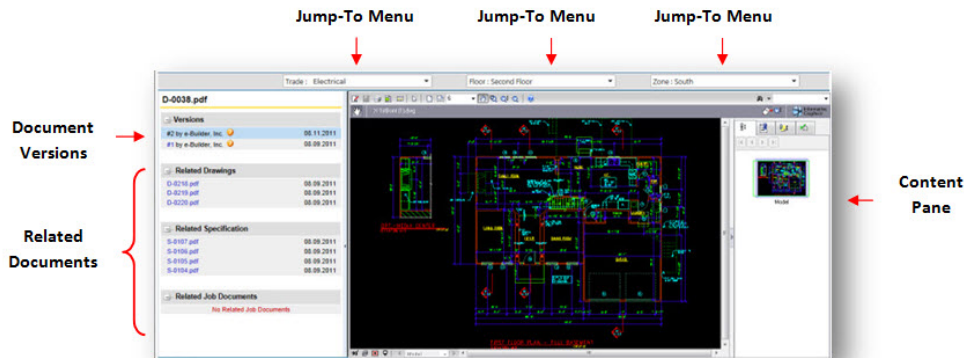


Related Topics:

- About the Plan Room

Plan Room Viewer Overview

Documents selected in the plan room open in the plan room viewer.



Sections and Fields

The sections and fields on this page are:

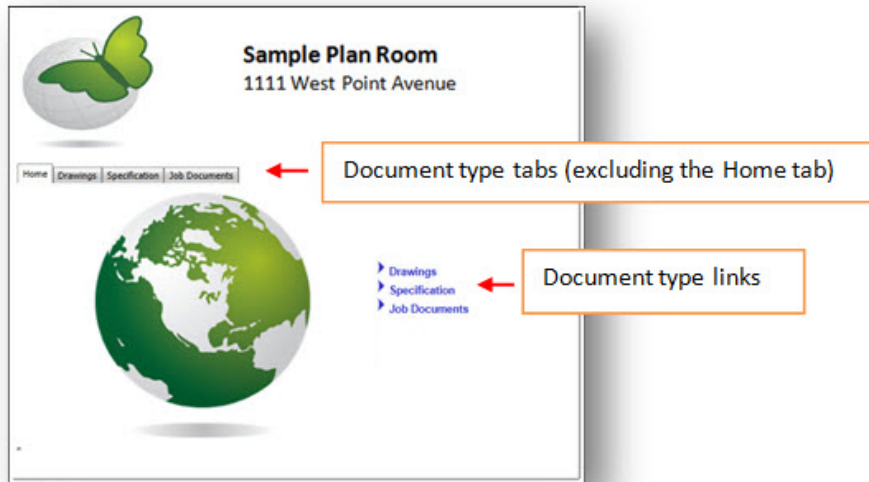
- **Jump-To Menu:** Jump-to menus allow you to quickly and easily jump to documents that share similar jump-to menu options of the file you are viewing. For example, if you are looking at an electrical drawing for the second floor, south zone, the jump-to menus allows you to easily switch to the drawings for another trade, but for the same position in the building (i.e. architectural, second floor, south zone).

Trade	File Name	Floor	Zone
Architectural	D-0218.PDF	Second Floor	South
Architectural	D-0219.pdf	Second Floor	South
Architectural	D-0220.PDF	Second Floor	South
Architectural	D-0221.PDF	Second Floor	South
Architectural	D-0222.PDF	Second Floor	South

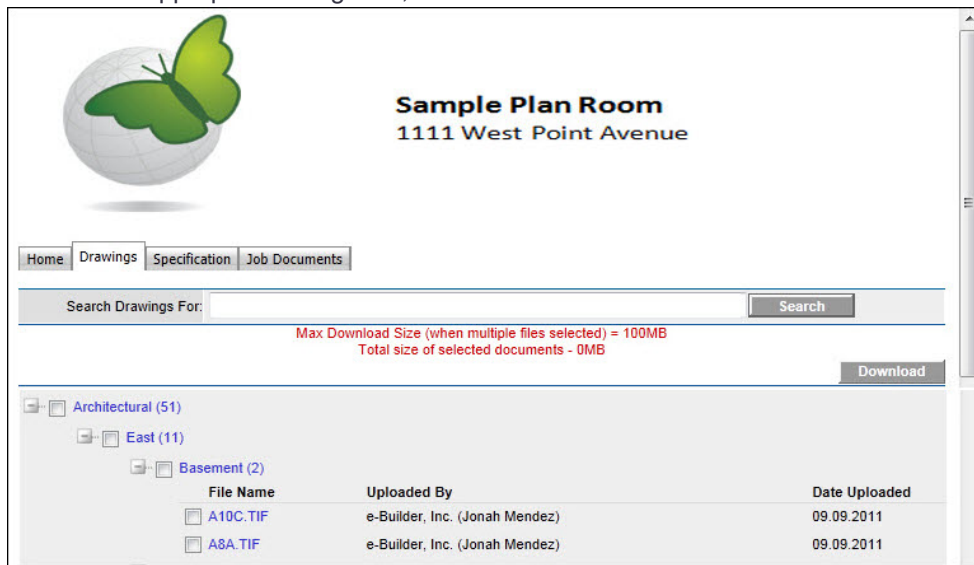
- **Document Versions:** This section lists all versions of the file you are viewing. Click the version # link to open the file in the content pane. Hover over the question mark icon to see the name of the person that created the version.
- **Related Documents:** This section lists related files for all the document types defined in the plan room. Expand any of the Related [Document Types] to view related files, i.e. related drawings, related specifications, related job documents etc.
- **Content Pane:** The document selected in the plan room displays in the content pane.

Open Files in the Plan Room

1. Click the document type (tab or link) of the file you want to open.



2. Choose the appropriate categories, and then click the file name.



The file opens up in the plan room viewer.

Note: To download the file select the check box next to the file and click **Download**.

About the Planning Module

The Planning module allows you to represent current and future plans in terms of budget, scheduling, and resources. The e-Builder Planning module is used to help you determine the feasibility of planned and potential projects and how they might fit into the scope of the capital plan. Stakeholders have real time visibility into

the status of capital plans. Using this module reduces the costs and risks associated with capital planning for facility owners and companies that act on their behalf. It does this by enabling a standard process to quantify and prioritize planned projects for inclusion in the capital plan. The Planning module is fully integrated with active project data so that the information you base decisions on is 100% complete and truly up to date.

Here are a few key advantages to using the planning module:

Better Alignment of Projects and Strategic Goals: Rank and prioritize projects based on your organization's strategic goals. Use consistent and objective criteria to prioritize the projects and achieve better alignment between your chosen projects and your strategic objectives.

Ability to Enforce a Standard Process: Maintain compliance with regulatory requirements and company policy. Ensure that only projects with complete information are considered and that all projects in the plan have the correct approvals and back-up documentation.

Total Visibility in Project Planning: Automate the process of keeping all stake holders (including project requesters) in the loop regarding planned and approved project status. Eliminate the time lag in communication and provide real time status as decisions are made.

Easy Access to Planning Data: Centrally maintain all current and historical planning data including potential project data and supporting information so that it can be accessed easily, searched, and used for analysis.

Scenario Based Planning Capability: Greatly simplify and speed up the process of developing what-if scenarios for planning. Eliminate all of the time and the manual effort that goes into creating scenarios so that you can analyze many more combinations and pick the best one.

Integration with Active Project Data: Obtain real time planning data including cash flow projections using up to the minute active project cost and schedule information improving visibility and decision making. Also eliminate the time and effort required to manually consolidate multiple data sources.

Access the Planning Module

There are two methods of accessing the Planning module. 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 way to access the Planning module is from the project menu - this will help you avoid having to reselect your project.

For a Specific Project

1. Click the **Planning** tab located on the Top Navigation Tabs.
2. Choose a project from the **All Projects** menu.

The Project Scenarios page is displayed.

For the Current Project

If you are already within a project, you can access the Planning module via the Project Menu located in the left navigation bar.

- Click **Planning**.

The Project Scenarios page is displayed.

Project Scenarios

Project scenarios allow you to define multiple estimates for a potential or planned project. Planned projects are those that your organization may not have committed to just yet, and scenarios allow you to establish rough estimates in order to determine whether or not a project will be feasible. A scenario includes a budget, schedule, and cash flow. A number of scenarios can be created for comparing and ultimately determining the best possible option. For example, one scenario might be fast tracked, another might include a new technology or implementation approach, and a different scenario might include an alternate, such as an extended parking garage. Once a scenario is published, it is available to be added to a capital plan.

There are six tasks required to create a scenario and need to be followed in this order:

1. Add new scenarios
2. Create categories
3. Add cost estimates
4. Adjust schedules
5. Add cash flow to categories
6. Publish scenarios

Access Project Scenarios

To access the Project Scenarios page

1. Click the **Planning** tab located on the Top Navigation Tabs.
2. Click the **Please select a project...** drop-down list and select your project.
The Project Scenarios page is displayed.
3. Click **View Published** or **Edit Working** under the title of the project scenario you want to open.

Project Scenario Page

Project Scenario Back to Project Scenarios

Details Notes (0) Documents (0) Forms (0) Processes (0) Snapshots (0)

Note: Double click on the schedule bar to set the cash flow for the category

Project: Account Admin - QA New Status: Draft

Name: Zenarie School of the Arts Description:

Sq. Ft: 39,000

Name	Estimate	FY 2013																	
		FQ3			FQ4			FQ1			FQ2			FQ3			FQ4		
		Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan
Design Fees	702,000																		
F Design Fees	8% of Construction																		
LS	0																		
Construction	8,775,000																		
SF General Construct	39,000 SF @ 225																		
LS	0																		
FF&E	303,550																		
LS IT Equipment	270,000																		
UC Projectors	11 EA @ 3,050																		
LS	0																		
LS Exterior	7,000																		
LS Signage	7,000																		
LS	0																		
Total	9,787,550	190,266				300,857				300,857			743,044			1,221,795			1,648,130







Cost Measurements

- **LS = Lump Sum:** Enter the lump sum of the item in the **Estimate** field.
- **UC = Unitized Cost:** Enter the quantity of the item then click the drop-down list to select a unit of measure. In the last field, enter the cost per unit.
- **SF = Square Feet:** The square footage must first be defined in the project scenario details in order to enter items by square feet. If the square feet are not already added to the scenario details, click **Edit** to include it.
- **F = Formula:** This cost measurement allows you to enter cost based on a percentage of another category item. Thus, the category you want to base your formula on must first be created before using this cost measurement.





Tabs

- **Details Tab:** When you access the project scenario page, the Details tab displays by default. This tab allows you to see and edit all the details of the project scenario.
- **Notes Tab:** Click to view or add notes to the scenario.
- **Documents Tab:** Click to view or add documents to the scenario. An example is a written estimate from one or more vendors to help drive the final budget, schedule, and cash flow components.
- **Forms Tab:** Click to attach forms or view forms that have been attached to the scenario. If enabled, you can also fill out forms directly from this tab. For instance, a capital authorization request can be attached, which is a record of the approved funds for the scenario. The planner might ask a contractor early on to give a preliminary estimate and that estimate can be attached as a reference.
- **Processes Tab:** Click to attach processes or view processes that have been attached to the scenario.
- **Snapshots Tab:** Click to view snapshots of the scenario. A snapshot is automatically taken when a published scenario is edited. This creates a version history for every edit that is made.

Buttons/ Icons

- Back to Project Scenarios  : Click this button to leave the Project Scenario page and return to the list of project scenarios.
- Add new category  : Click to add a new category. Categories are phases of the project for which you need to plan for.
- Edit  : Click to edit the name and/or description of the scenario. You can also alter the square footage of the property.
- Create template  : Click to create another scenario using the current scenario as a template.
- Delete  : Click to delete the scenario.
- Apply a template  : Click to apply a preexisting scenario template. To create scenario templates, please see your e-Builder Administrator.

Note: You can apply more than one template freely at any time. Keep in mind that if the same categories exist in the plan and in the template, but line items are different, only the different line items will be added.

- Publish : Click to publish the scenario. Publishing scenarios makes them available for inclusion into the capital plan. If you edit a published scenario, a snapshot will automatically be created on the previously published version and can be referenced later on.
- Export to Excel : Click to export the scenario to a Microsoft Excel® spreadsheet.
- Zoom in or Zoom Out  or : Click to adjust the zoom. Zooming-in allows you to see a monthly view of the calendar. Zooming midway provides a quarterly view and when fully expanded, you can see a yearly view of the calendar.

Related Topics:

- Create Scenarios

Create Scenarios

There are six tasks that are required to create a scenario and need to be followed in this order:

Note:

- At least one scenario view is required for adding project scenarios. Scenario views are created by your e-Builder Administrator. For more information, see Create Scenario Views.
- Various units of measure can be used when creating project scenarios and category assumptions. Your e-Builder Administrator defines these metrics. If you need additional units of measure added, the account administrator may refer to Units of Measure.

1. Add New Scenarios
2. Create Categories
3. Add Cost Estimates
4. Adjust Schedules
5. Add Cash Flow to Categories
6. Publish Scenarios

Add New Scenarios

Tip

If you know ahead of time that you will be comparing scenarios, it is a good idea to give the categories and assumptions in your different scenarios the same name, so that they are aligned during the comparison.

1. Go to the Planning module.
For more information, see Access the Planning Module.
2. Click **Add Scenario**.
The Add Scenario dialog box displays.

3. Enter the name of the scenario in the **Name** field.
4. *Optional:* You can also enter the square footage in the **Sq. Ft.** field.
This field must be completed if you intend to enter category assumption prices per square feet. You can add this information later on, by clicking Edit on the Project Scenario page.
5. Click **Save**.
The Project Scenario page is displayed.

*There are six tasks for creating scenarios that need to be following in sequence. This is task 1 of 6. The next task is Create Categories.

Related Topics

- Create Scenarios
- Units of Measure

Create Categories

Categories are phases of the project for which you need to plan for. Example categories are land acquisition, design, construction, etc. The sum of all these categories (which is automatically calculated) will show when added to a capital plan.

To create categories

1. Go to the desired scenario.
For more information, see Access Project Scenarios.
2. Click the **Category** icon.
The Add Category dialog box displays.
3. Enter the name of the category in the **Name** field.
4. Click the **Start Date** and **Finish Date** drop-down arrows and select the projected start and end month/year for this category.

Note: When doing this, the system will automatically create the schedule Gantt bar for you. These are optional fields and the start/finish dates can be adjusted later on. For more information, see Adjust Schedules

5. Click **Save**.
*There are six tasks for creating scenarios that need to be following in sequence. This is task 2 of 6. The next task is Add Cost Estimates.

Related Topics

- Create Scenarios

Add Cost Estimates

As many assumptions as necessary can be added to each category. These segments make up the sum of the category.

To create category assumptions

1. Go to the desired scenario.
For more information, see Access Project Scenarios.
2. In each respective category, click the next available line and enter a category assumption.
3. In the **Estimate** column, enter the estimated cost for this item.

Note:

Costs can be entered with any of the different units of measure listed below. Toggle between the options by clicking the unit of measure.

- LS = Lump Sum
- UC = Unitized Cost
- SF = Square Feet
- F = Formula

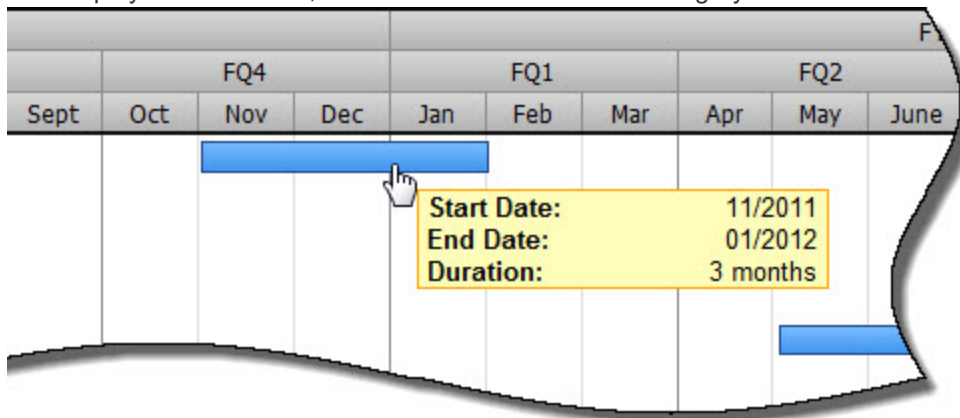
*There are six tasks for creating scenarios that need to be following in sequence. This is task 3 of 6. The next task is Adjust Schedules.

Related Topics:


- Project Scenario Page Overview
- Create Scenarios

Adjust Schedules

1. Go to the desired scenario. For more information, see Access Project Scenarios.
2. Select and drag the schedule bar to the desired position on the calendar. (You can drag the schedule bar off to the edge of the plan to have the bar move out in time, past the screen.) Click and drag the ends of the schedule bar to adjust the duration. When you hover over the schedule bar, a pop-up window displays the start date, end date and duration of the category.



Tip

If the category will last longer than a few months, click Zoom-out  to expand the plan and see a yearly view. Setting schedules that span across multiple years is easier to do in this calendar view.

*There are six tasks for creating scenarios that need to be following in sequence. This is task 4 of 6. The next task is Add Cash Flow to Categories.

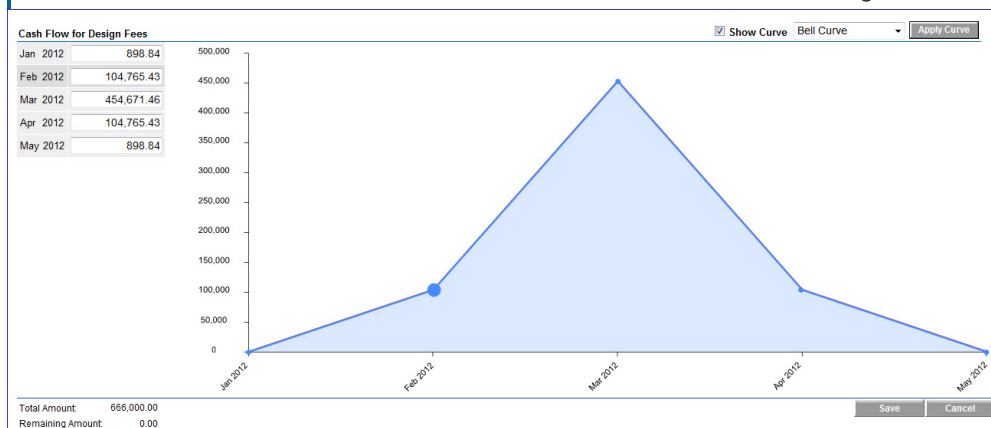
Related Topics:

- Create Scenarios

Add Cash Flow to Categories

Note:

- If you do not set the cash flow for each category, the system will automatically set the cash flow to linear distribution (equal distribution of dollars in every month).
- A cash flow cannot be created until a schedule is defined and a budget is entered.



To add cash flow to categories

1. Go to the desired scenario.
For more information, see Access Project Scenarios.
2. Double click the schedule bar to set the cash flow for the category.
The Cash Flow for [Category] popup window displays.
3. Click **Apply Curve** to populate the dollar fields per month located in the upper left corner of the window.
The dollar fields are appropriated according to the selected cash flow curve.
4. To view cash flow for different curves, click the drop-down list next to the **Show Curve** check box and select the desired cash flow curve.
5. Click **Apply Curve**.
6. Click **Save**.

*There are six tasks for creating scenarios that need to be following in sequence. This is task 5 of 6. The next task is Publish Scenarios.

Related Topics:

- Create Scenarios

Publish Scenarios

Publishing scenarios makes them available for use in the capital plan. Once published, you can edit a scenario if necessary and a snapshot of the previous version will be taken for your reference.

1. Go to the desired scenario.
For more information, see [Access Project Scenarios](#).
2. Click the **Publish** icon.
You are prompted for confirmation.
3. Click **OK**.

*There are six tasks for creating scenarios that need to be following in sequence. This is task 6 of 6. For more information on creating scenarios, see [Create Scenarios](#).

Related Topics:

- [Project Scenarios](#)

Compare Scenarios

The compare scenarios feature is a collaborative tool. Comparing scenarios is a great way to determine the most feasible scenario among your options to add to the capital plan.

Tip

If you know ahead of time that you will be comparing scenarios, it is a good idea to give the categories and assumptions the same name, so that they are aligned during the comparison. Otherwise they will show up on different rows which might make it difficult to compare.

1. Go to the Planning module.
For more information, see [Access the Planning Module](#).
2. Select the check boxes next to the project scenarios you want to compare.
3. Click **Compare**.
The Scenario Comparison page is displayed.

Note: Values that are different between compared scenarios will automatically show in red.

Capital Plan Page








The details of this page are described below.




Tabs

- **Details:** When you access the capital plan page, the Details tab displays by default. This tab allows you to see and edit all the details of the capital plan.
- **Notes:** Click this tab to view or add notes to the capital plan.
- **Documents:** Click this tab to view or add documents to the capital plan. Sample documents can be any number of things: an approved letter received from the board on the approval of the plan, documents that instruct the planner to modify the plan based on some new findings, etc.

- **Forms:** Click this tab to attach forms or view forms that have been attached to the capital plan. If enabled, you can also fill out forms directly from this tab. Sample items might include information that instructs team members on what to include in the plan. Official approval from the board or public.
- **Processes:** Click this tab to attach processes or view processes that have been attached to the capital plan.

Buttons

- Cancel : Click this button to leave the Project Scenario page and return to a list of all project scenarios.
- Add project : Click this icon to add active projects to the capital plan. Active projects must meet the following minimum requirements to be eligible for capital plan inclusion:
 - Project target date is in the future
 - Project has an active cash flow
 - There must be at least one project view created for the account.
- Add scenario : Click this icon to add scenarios to the capital plan. Scenarios are created for potential/ planned projects.
- Add funding sources : Click this icon to add funding sources and their funds to the capital plan.
- Edit : Click this icon to edit the following items:
 - Name
 - Description
 - Square footage
 - Add/ Modify custom fields
- Create from template : Click this icon to create another capital plan using the current plan as a template.
- Delete : Click this icon to delete the capital plan.
- Accept and apply : This icon is enabled when there are changes made to either scenarios or active projects. A warning icon  shows up next to each project when there is a cash flow change. This icon allows you to accept and apply ALL changes to the plan at once.
- Add escalation percentages : Click this icon to add escalation percentages per fiscal year. If your e-Builder Administrator has already added escalation rates to the account, the changes you make here, will take precedence. For more information, see how escalation rates work.
- Finalize : Click this icon to finalize the capital plan.

- Export to Excel : Click this icon to export the capital plan to a Microsoft Excel® spreadsheet. On finalized plans the export shows what was finalized and what is currently in progress. We show two tabs one for each. The purpose here is that the planner can view the original plan and see how it's deviated from its course. Then he/she can make any necessary course adjustments.
- Zoom in  or Zoom out : Click either of these icons to adjust the zoom. Zooming allows you to see a monthly view of the calendar. Zooming midway provides a quarterly view and when fully expanded, you can see a yearly view of the calendar.

Related Topics:

- Create a Capital Plan
- View Changes to the Capital Plan




Capital Plan Page












The details of this page are described below.

Tabs

- **Details:** When you access the capital plan page, the Details tab displays by default. This tab allows you to see and edit all the details of the capital plan.
- **Notes:** Click this tab to view or add notes to the capital plan.
- **Documents:** Click this tab to view or add documents to the capital plan. Sample documents can be any number of things: an approved letter received from the board on the approval of the plan, documents that instruct the planner to modify the plan based on some new findings, etc.
- **Forms:** Click this tab to attach forms or view forms that have been attached to the capital plan. If enabled, you can also fill out forms directly from this tab. Sample items might include information that instructs team members on what to include in the plan. Official approval from the board or public.
- **Processes:** Click this tab to attach processes or view processes that have been attached to the capital plan.

Buttons

- Cancel : Click this button to leave the Project Scenario page and return to a list of all project scenarios.
- Add project : Click this icon to add active projects to the capital plan. Active projects must meet the following minimum requirements to be eligible for capital plan inclusion:
 - Project target date is in the future
 - Project has an active cash flow
 - There must be at least one project view created for the account.
- Add scenario : Click this icon to add scenarios to the capital plan. Scenarios are created for potential/ planned projects.

- Add funding sources : Click this icon to add funding sources and their funds to the capital plan.
- Edit : Click this icon to edit the following items:
 - Name
 - Description
 - Square footage
 - Add/ Modify custom fields
- Create from template : Click this icon to create another capital plan using the current plan as a template.
- Delete : Click this icon to delete the capital plan.
- Accept and apply : This icon is enabled when there are changes made to either scenarios or active projects. A warning icon  shows up next to each project when there is a cash flow change. This icon allows you to accept and apply ALL changes to the plan at once.
- Add escalation percentages : Click this icon to add escalation percentages per fiscal year. If your e-Builder Administrator has already added escalation rates to the account, the changes you make here, will take precedence. For more information, see how escalation rates work.
- Finalize : Click this icon to finalize the capital plan.
- Export to Excel : Click this icon to export the capital plan to a Microsoft Excel® spreadsheet. On finalized plans the export shows what was finalized and what is currently in progress. We show two tabs one for each. The purpose here is that the planner can view the original plan and see how it's deviated from its course. Then he/she can make any necessary course adjustments.
- Zoom in  or Zoom out : Click either of these icons to adjust the zoom. Zooming allows you to see a monthly view of the calendar. Zooming midway provides a quarterly view and when fully expanded, you can see a yearly view of the calendar.

Related Topics:

- Create a Capital Plan
- View Changes to the Capital Plan

Create a Capital Plan

To create a capital plan

1. Click the **Planning** tab located on the Top Navigation Tabs.
A list of capital plans display.
2. Click **Add Capital Plan**.

The Add Capital Plan dialog box displays.

3. Enter the name of the capital plan in the **Name** field.
4. Click **Save**.

Related Topics:

- Add Scenarios to the Capital Plan
- Add Funding to the Capital Plan
- View Changes to the Capital Plan

Open an Existing Capital Plan

Note: The capital plan page can only be accessed if a capital plan has already been created.

1. Click the **Planning** tab located on the Top Navigation Tabs.

A list of capital plans display.

2. For drafts plans, click the **Draft Plans** tab.

—Or—

For finalized plans, click the **Finalized Plans** tab.

3. Click the title of the capital plan you want to open.

The capital plan page displays.

Related Topics:

- Create a Capital Plan

Add Active Projects to the Capital Plan

Note: If you add the same project to multiple capital plans and modify the project's cash flow, these details will automatically update across all capital plans.

1. Go to the capital plan.

For more information, see Open an Existing Capital Plan.

2. Click the **Project** icon.

A list of available projects display. Eligible projects have an Add link to left of the project name.

3. Click the **Add** link next to all the projects you want to add.

4. Click **Close**.

The project(s) are added to the Active Projects section of the table.

If you're having trouble adding active projects, ask your e-Builder Administrator to ensure that the following requirements are met:

- The project's target end date is in the future
- The project has an updated cash flow
- There is at least one project view created for the account

Add Scenarios to the Capital Plan

To add scenarios to the capital plan


1. Open the capital plan.
For more information, see [Open an Existing Capital Plan](#).
2. Click the **Scenario** icon.
A list of published scenarios display.
3. Click the **Add** link next to all the scenarios you want to add.
4. Click **Close**.
The scenarios are added to the Planned Projects section of the table.

If you're having trouble adding active projects, ask your e-Builder Administrator to ensure that the following requirements are met:

- At least one scenario has been created
- At least one scenario view has been created
- Also, please see your e-Builder Administrator if you're not able to pick from a list of scenarios.

Add Funding to the Capital Plan

To add funding to the capital plan

1. Open the capital plan.
For more information, see [Open an Existing Capital Plan](#).
2. Click the **Funding** icon ()
The Funding dialog box displays.
3. Enter all required information:
 - Funding source(s)
 - Funding amount for each calendar or fiscal year
4. Click **Save**.

View Cash Flow Curves

1. Open the capital plan.
For more information, see [Open an Existing Capital Plan](#).
2. Double click the schedule bar.
The cash flow for that project or scenario will popup in a separate window and you are able to see the cash flow curve.

Note: Cash flow curves are set in the cost module for active projects. For more information, see [Setting up Cash Flow](#). For scenarios, the cash flow is created when building out a scenario see [Add Cash Flow to Categories](#).

Related Topics:

- View Changes to the Capital Plan

View Changes to the Capital Plan

When the cash flow has been changed in an active or planned project, an exclamation icon displays next to the project's name, indicating a change. The planning manager can click this icon to view details of the change, accept or reject changes.

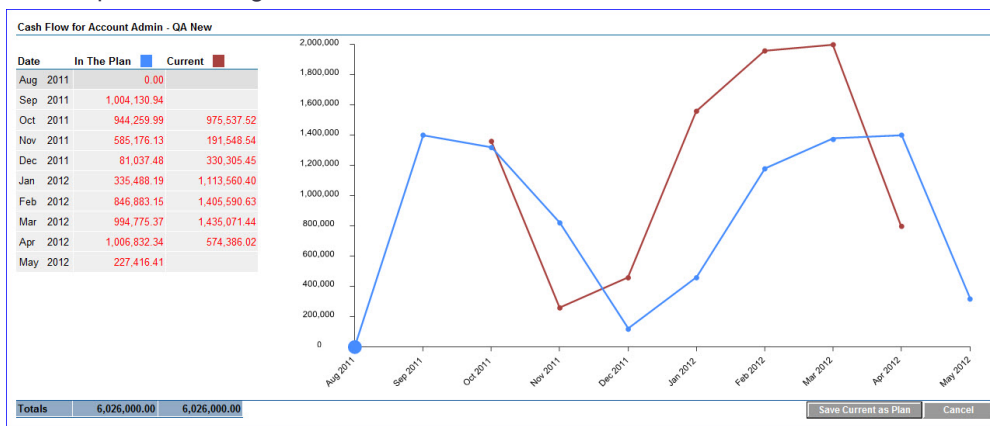
	Name	Amount	FQ2		
			Apr	May	June
	Funding	6,008,000			
↑	✘ Broward County Schools	5,770,000			20
↑	✘ Community Development Grant	238,000			
	Active Projects	6,026,000			
↑	⚠ ✘ Center for Economic Development	6,026,000			
		8,961,886			

Changes show for a number of reasons. For planned projects (scenarios), the icon displays when a change is made to the cash flow. As a best practice and a practice common in most organizations, the cash flow is updated every time a change is made to the budget, schedule, commitments or invoices. This cash flow change is reflected in the capital plan. It is important to note changes to budget, schedule, commitments or invoices will not be reflected in the capital plan unless the cash flow is updated.


Active Projects

Click the change icon next to the active project to view changes. A popup window similar to the one below displays. All changes appear in red. In the table on the left of this screen, the **In The Plan** column shows figures that are in the current capital plan, and the **Current** column displays the changes. Totals for each column are located toward the bottom of the screen, allowing you to see what significant budget changes there are, if any. In the graph, the red line shows the cash flow curve of the recently changed figures. The blue line represents cash flow in the current plan, before any changes.

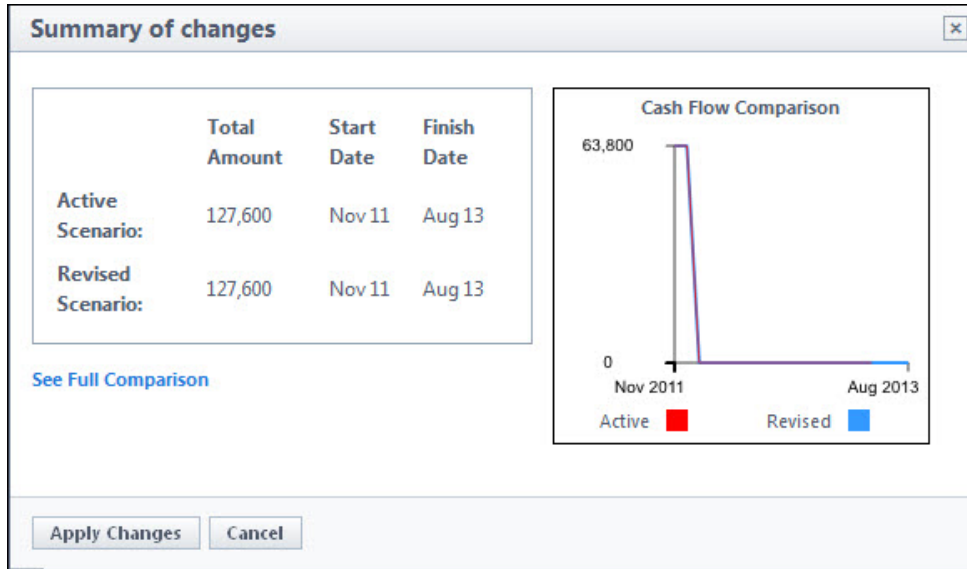
To accept these changes, click **Save Current as Plan** otherwise, click **Cancel**.



Planned Projects (Scenarios)


Click the change icon  next to the planned project to view changes. A popup window similar to the one below displays. This particular example shows an increase in the cash flow. The **Active Scenario** and **Revised Scenario** fields show you the difference in total amounts. Below this, the dollar amount by which the budget was increased displays.

To accept these changes, click **Apply Changes**, otherwise, click **Close**.



See Full Comparison

Click See Full Comparison to see a side by side view of the details of each scenario for better comparisons.

Note: You can also click the Apply All icon  located on the capital plan page to view and apply ALL changes at once.

Capital Planning					
Scenario Comparison					
Categories	Sample Project Scenario (REVISED)		Sample Project Scenario		
Design Fees	01.01.2012 - 05.31.2012		01.01.2012 - 05.31.2012		
Design Fees		8% of Construction	702,000	8% of Construction	666,000
			0		0
Subtotal:			702,000		666,000
Construction	06.01.2012 - 09.30.2013		06.01.2012 - 09.30.2013		
General Construction		39,000 SF @ 225.00	8,775,000	37,000 SF @ 225.00	8,325,000
Subtotal:			8,775,000		8,325,000
FF&E	07.01.2013 - 09.30.2013		07.01.2013 - 09.30.2013		
IT Equipment			270,000		250,000
3 MRIs		3 EA @ 3,050.00	9,150	3 EA @ 3,000.00	9,000
Subtotal:			279,150		259,000
Exterior	07.01.2013 - 09.30.2013		07.01.2013 - 09.30.2013		
Signage			7,000		5,000
Subtotal:			7,000		5,000
Total Project Cost:			9,763,150		9,255,000

Modify Capital Plan Custom Fields

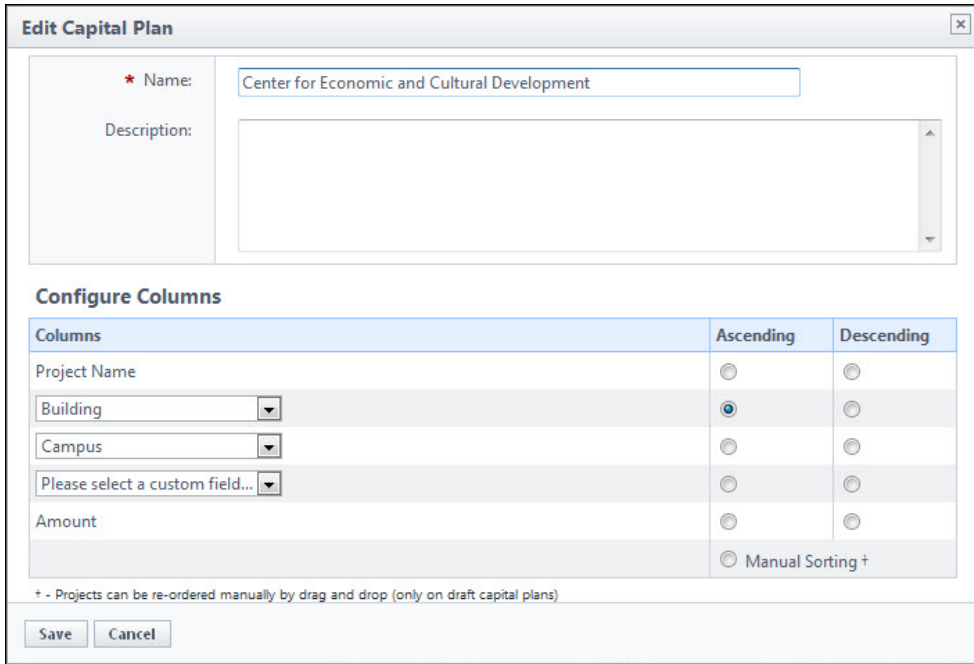
If custom fields are set on your account, you can choose up to three custom fields by which to sort data in the capital plan. Custom fields support the need to sort projects by different criteria such as resource, campus, building, project number, or any data that is pertinent to make smart planning decisions. You can modify these custom fields by choosing different/additional fields or changing the order in which they are sorted.

To modify capital plan custom fields

1. Open the capital plan.
For more information, see Open an Existing Capital Plan.

2. Click the **Edit** icon .

The Edit Capital Plan dialog box displays.



Columns	Ascending	Descending
Project Name	<input type="radio"/>	<input type="radio"/>
Building <input type="text" value="Building"/>	<input checked="" type="radio"/>	<input type="radio"/>
Campus <input type="text" value="Campus"/>	<input type="radio"/>	<input type="radio"/>
Please select a custom field... <input type="text" value="Please select a custom field..."/>	<input type="radio"/>	<input type="radio"/>
Amount	<input type="radio"/>	<input type="radio"/>
		<input type="radio"/> Manual Sorting ⁺

+ - Projects can be re-ordered manually by drag and drop (only on draft capital plans)

3. Click the drop-down arrows in the **Configure Columns** section and select the desired custom fields.
4. In either the **Ascending** or **Descending** columns, select the option by which you want to sort the custom fields.
5. Click **Save**.

Planning Reports

The Planning Reports option enables you to report upon Capital Plan and Scenario information created in the Planning module. Planning reports provide visibility into Capital Plans and Scenarios, across multiple projects, as well as Capital Plan Details, Capital Plan Cash Flows, Scenario Details and Scenario Cash Flows. These Planning Reports enable deeper analysis on all planned projects in order to reach resource allocation decisions more quickly, and make more informed choices.

Report Wizard Step 1 of 6

Jump to step: Select type of data for report

Step 1: Select type of data for report and run as user

Planning Reports

- Capital Plan
- Capital Plan Details
- Capital Plan Cash Flow
- Scenario
- Scenario Details
- Scenario Cash Flow

Run As User:

Note: Populate Run As User field using Lookup to run the report in that user's context. Leave it blank to run the report in logged in user's context.

Name	Description	Status	Date Created
2014 Bond Program	Work Scheduled	Draft	03.24.2011
2014 Bond Program - Alternate		Draft	02.24.2011
2011 Bond Program		Finalized	03.14.2011
2011 Bond Program II		Finalized	03.14.2011
Future Work		Draft	03.09.2011

Report on capital plan information.

For more information on how to customize and run a report in e-Builder, see Reports Module Overview.

The types of planning reports that can be run are as follows:

- **Capital Plan:** Report on multiple Capital Plans across projects. For example, a higher education program with 50 campuses may have a capital plan for each campus.
- **Capital Plan Details:** Report on all the Capital Plan Details that are entered for each capital plan in the Planning module. For example, view all the Funding, Active Projects and Planned Projects that are configured under each Capital Plan for a higher level view.
- **Capital Plan Cash Flow:** Report on the Cash Flow amounts configured for each saved Capital Plan including the Cash Flows for Active and Planned Projects.
- **Scenario:** Report on multiple scenarios across all planned projects. For example, present scenario data within a single report to give the bigger picture of all Planning Scenarios, in order to facilitate effective decision making.
- **Scenario Details:** Report on all the details entered for each scenario within a project.
- **Scenario Cash Flow:** Report on the cash flows entered for each project scenario within a single planned project.

About the Processes Module

The e-Builder Processes module (also referred to as Structured Workflow) is a collaborative system that automates business process according to a set of business rules.

Collaboration

A core capability of the e-Builder system is its ability to facilitate collaboration. Effective collaboration and communication among the project teams is an essential ingredient for success on each construction project. The e-Builder Processes module facilitates collaboration by providing a mechanism to route information based on defined business rules, track communications and ensure accountability for all parties along the process work path.

The system will empower an organization to store, retrieve, change and use the business rules that affect its operations in a simulated and repeatable environment. Consistent and standardized processes within an organization that would normally require human knowledge to carry out can now be taken care of by the system. In other words, the system allows all project team members to access and update a process with little to no knowledge of the entire process, because the process is automated.

Automated steps help do away with many of the project participant mundane tasks, leaving them time to focus their energy on their jobs. A business process is structured so each instance is managed according to the same business rules, every time. This consistency provides stability in the business and predictability for the resources.

For example, if a subcontractor had to fill out an RFI in the real world via a paper process the subcontractor has to know who to send it to for a particular project. Let's say procedurally it is defined that the subcontractor must send the RFI to the general contractor project manager before routing it to the owner project manager and the A/E. Traditionally, outside of a system like e-Builder, the subcontractor would have to know to do that based on their contractual agreement. In the structured workflow enhanced feature set the subcontractor could submit the RFI and the system would know to route it to the general contractor project manager automatically. There is no thought required other than filling out the question in the RFI. And when the general contractor project manager received the RFI and reviewed it, they could determine there was a cost and/or a schedule impact. If there was such an impact, then when the general contractor project manager submitted, the system could automatically route to the owner project manager first to give them visibility to manage the exposure, and if not it could route directly to the A/E project manager to answer. It all depends on the way the structured workflow is configured. The e-Builder Processes module makes the process efficient and less prone to error because the system is routing the process for you based on a set of predefined business rules.

Benefits of a Structured Workflow

Improved Project Execution

Well-defined processes that can be enforced in a system eliminate the chance of mistakes. An audit trail assists in identifying any mistakes in the process. A standard process also will drive standard reporting, which results in clear visibility into the projects. This enables the project team to act on information early in the process before they become too costly or time consuming to address.

Automated workflow allows for continuous process improvement. The module allows for the collection of detailed information on work processes over time. As business environments change the organization can modify its processes based on lessons learned and data collected to further improve project execution.

Faster On-Boarding of Employees

Faster "on-boarding" of employees enables the organization to scale. The process is consistent and easy to follow based on user roles and permissions. It does not require in depth knowledge of the process rules or policies and procedures. These variables are all addressed in the system so the new user simply follows the steps in the process. Additionally, employee turnover does not result in loss of quality or a break in the process.

Improved Employee Productivity

Improved employee productivity eliminates dead time between steps. Reportable statistics are automatically generated as a measure to continuously improve the process over time. Processes are transparent and result in increased accountability, which in turn results in improved productivity. Repetitive tasks are automated freeing resources to focus on tasks that add more value to the organization. Business rules are placed throughout each step in the process to ensure that the data is entered correctly and escalation occurs automatically if any of the steps are delayed unnecessarily. And, using defined workflow to automate these types of processes streamlines the organization by reducing data entry to key people, thereby reducing errors and improving productivity.

Elimination of Redundancy

In e-Builder many of the work processes result in action taken in the cost or document management modules. Therefore, the enhanced workflow features provide the capability to integrate cost and document functions into one process. A typical example of this would be a change order approval process that results in a change to the committed costs and backup or supporting documentation in the central file library for the project. In this example the commitment change can be created and the status of it (via routing for approval) can update and reflect automatically in the cost module for exposure. And the supporting documentation can automatically be configured to be placed in a predefined folder. No extra work required. It is completely managed in the process definition.

Tighter Compliance with Regulatory Organizations

The system provides an automatic audit trail for compliance reporting. Automatic routing of information through a process ensures that no steps are forgotten or missed resulting in improved compliance. In addition, a structured process in e-Builder can be demonstrated to auditors and regulators and information can easily be reported.

Typical Job Functions Using this Module

e-Builder supports the different team members that are involved in the project. Based on their job function, users may be able to configure, initiate, view, update or close processes. Processes are project and role permission based. If required, a work flow (routing of process steps) can be defined to point to a set of projects or even a specific data field in a process layout can be set up to only be visible to a set of key roles. Any user who is involved in communication of a project can be involved with processes. Which users, process types, data fields, layouts, and work flows are utilized are specific to the process requirements.

Each role or job function will have access to create or respond to specific processes defined by your managers and administrators. Listed below are a subset of users that have responsibilities and influence in defining, configuring and maintaining a set of processes in e-Builder.

Project or Executive Assistant

User Role: Account Administrator

Background

The project or executive assistant for an owner company is responsible for coordinating, organizing, and handling the day-to-day activities or tasks required to support the executive or project manager, which includes managing project files, distributing all correspondence as directed by the executive or project

manager, maintaining logs, and coordinating meetings. The project assistant needs to communicate to other departments and update the executive or project manager on messages and the status of delegated work. In addition, the assistant will ensure the adequacy of supporting documents (contracts, change orders, legal documents, invoices, etc.)

Role

During an e-Builder implementation, the project assistant will be working closely with the e-Builder implementation team to set up the work flows. This means the assistant will be providing feedback and designing the work flow processes using the front end designer. Once the implementation team rolls off of the project, the assistant will be responsible for creating new work flows or modifying existing ones. Basically the assistant will manage the work flow environment. In addition, the assistant will override specific instances of a work flow should the need arise due to a user leaving the company (for example) to address the processes in their court.

Project Manager

User Role: Work flow Initiator

Background

The project manager is intimately familiar with each of the key processes required to successfully deliver capital projects within budget and on time. The primary responsibility is to project manage the project. Specifically, the manager will provide advice and consultation with respect to design, scope of work, and cost estimating. The manager will also assist and manage the pre-qualification and selection of the architect/ engineer and general contractor and negotiate on unforeseen conditions or oversights from the designer or general contractor. The project manager will use a schedule as a tool to assist in controlling the timing and performance of building the project and a cost management system to ensure the project remains within budget.

Role

The project manager is involved with the business process. The project manager will go to the work flow area to initiate a process or go to the specific module and start the process there. Two options exist for each process initiation. The manager may not initiate a process every day. Once the manager starts a process the system will support the manager to do what is required. It will not let the project manager do something he should not do. The project manager will also be able to delegate work to his team members easily when needed.

Financial Director

User Role: Work flow Responder

Background

The financial director is responsible for enhancing financial controls, delivering strategic financial assistance to the board and continuing the development of external relationships to ensure future finance and investment opportunities are recognized. The director will assist in earned value analysis, projecting cash flow management, and reporting on overall profitability performance.

Role

As the work flow responder, the financial director will be able to act on work flow items sent in an easy way. The director will be instantly notified via email so that the item can be responded to in a timely manner requiring little to no thought on what needs to happen next. Once in the system the steps will be clearly outlined on what the director needs to do within each process. The director may need to approve a funding request or a budget, for example, within e-Builder and the process will be intuitive to ensure the process is completed in a timely manner.

Executive

User Role: Work flow Responder and Reporter

Background

The executive is primarily responsible for ensuring the company meets specific goals and objectives. The executive devises strategies and formulates policies to ensure that these types of objectives are met. The executive meets with the subordinate executives regularly to ensure that operations are conducted in accordance with the company's goals. The executive also meets with the board regularly and is required to report to them the overall health of the project portfolios. The executive is held accountable for the success or failure of the organization.

Role

The executive will be required from time to time to respond to work flow that requires their approval. As such, it is critical that the process required from them (starting with the email notification and finishing with the approval action) is very easy to access and complete. If the executive, for example, is reviewing cost items (budget, contract, etc.) then it can be configured so that the executive can review the financial data within the work flow itself to ensure the approval is efficient and automatically updated in the Cost module where appropriate.

The executive needs to maintain visibility of all the projects within the program. Reporting is a key requirement for the executive to be able to quickly ascertain the overall healthiness of the program. Ultimately, the solution will provide adequate reports and dashboard views to allow the executive to manage the work flow processes by exception. The reports will be dynamic (or real time) and require little to no effort by the executive to generate.

Key Concepts

Before you start reading the e-Builder Processes module help, you should familiarize yourself with some key concepts used throughout this section.

Project

Most everything in e-Builder takes place within the context of a project. Projects in e-Builder refer to the various projects that you are participating in. Each real world project is associated with a project in e-Builder. If you are working on the real world project, then you can be added as a member of the project in e-Builder. Your Project Administrator or Manager will be able to add you as a member of a project in e-Builder.

Process Type

The process type is the name of the process. Examples of process types are Change Order Request, Submittal and Project Issue. Each process type has a work flow comprised of a series of steps. Each step has permissions assigned to it. This determines who can act or view on each step. Because of this, you may be able to act and view certain instances of process types, but, unable to initiate or act on an instance of another process type.

Module Integration

If the Cost Module is activated for your account process types can be integrated with cost items. A process type can include one and only one cost item. The cost items available are budget change, commitment, commitment change, commitment invoice and general invoice. When integrated the cost item details are contained in the process type automatically. That means that when a process is filled out that is configured as such, then the status and details of the cost item will automatically be updated in the Cost Module. This solution eliminates redundancy.

Data Fields

Fields can be configured to store information related to the process. These fields can present as drop down boxes, to date fields, to file fields and many other types that you may be familiar with as it relates to filling data out on an electronic document. Data fields automatically create unique variable names for use in reports and mail merge. Data fields have permissions assigned to them so that the field can be restricted only to certain roles.

Page Layouts

Page Layouts organize data fields into custom displays. A layout is associated with a step in a work flow. There can be both actor and non-actor layouts associated with each step, allowing you to restrict proprietary data not meant for to be edited or even viewable by non-actor users accessing the step. Data fields are added to layouts and each field can be marked as read-only or required based on your business requirements.

Sections

There are one to many sections in a page layout. Each section is a collection of data fields. The purpose of a section is to separate data into like areas to organize your data layout in a way that resonates with the potential actors.

Workflow

Workflow is the automation of a business process (entirely or partially) during which documents and other pertinent information is passed from one participant to another for action, according to a set of procedural or business rules. Each process type can have one or more work flows assigned to it. Each project has one work flow assigned to it. In each work flow there are a series of flows consisting of steps and connectors with a start and finish.

Actor

An actor is a person that can act on a step. When a work flow enters a step the actors receive a notification via email to login e-Builder and accept or decline the responsibility to complete that step. Once an actor takes an action the step is considered to be completed.

Action

An action is a trigger to complete a step in a work flow. Data entry steps are those steps where it requires a human to act on it. Each of these steps include one or more actions. When an action is taken the work flow routes to the next step.

Data Assignments

Data assignments can be configured to automatically set a value to a data field. There can one or more data assignments set for an action.

Step

A work flow step organizes the page layouts, actors and non-actors, actions, data assignments and standard due dates. Each step represents an activity that needs to be completed by an actor in order for the work flow to move on its path towards completion (or finish).

Data Entry Step

The data entry step requires a person in an actor role to complete it. Each data entry will require an actor to take an action in order for the work flow to move on its path towards completion. In addition, there can be data fields that are required to be entered or updated.

Conditional Step

A conditional step is a defined statement that can take a path of true or false. It is configured to let the system determine the route in the work flow.

Connector

A connector connects two steps together. A connector requires a from step, action and to step.

Spawn Process Step

A spawn process step allows a process to spawn another process when the work flow enters that step. A classic example of this would be a potential change order (PCO) that can spawn a change order request (COR) if it is approved by the appropriate parties.

To access the Processes module

1. Click the **Processes** tab located at the top of the page.

On the Processes page, you can click to view a process. To view only the processes for a project, select the project from the drop-down list.

Processes For Project Page

From the Processes For {project} page, you can start a process, access active processes in order to take further action, or view detailed information.

To access the Processes page

1. Click the **Processes** tab located at the top of the page.
2. Choose a project from the **All Projects** menu.

The Project Processes page is displayed.

Project Processes

- **Unfinished Drafts:** See and take action on draft forms and processes
- **Processes for:** Click this drop-down arrow to access processes for different projects. This menu gives you a quick and easy way to switch between projects.

Filter Processes


Use filters to narrow your search results to just the process types that you need.

e-Builder automatically saves the filters and grid display options that were last used and displays them the next time you come back to the **Project Processes** page.

Instance	State	Subject	Counter	Step	Total Age (days)	Prefix	Type	Step Variance (days)	Total Variance (days)
EP-1	Unfinished	New Maintenance Shed	1	Data Entry 1	4081	EP	Equipment Holder Process		
EP-2	Unfinished	Tractor purchase	2	Data Entry 2	647	EP	Equipment Holder Process	-654	
EP-3	Unfinished	Front end loader purchase	3	Data Entry 2	605	EP	Equipment Holder Process	-624	-655
SLP-1	Complete	Expand West Parking Lot	1	Finish	24	SLP	Soilwork Process		-14
SLP-2	Complete	Expand East Parking Lot	2	Finish	24	SLP	Soilwork Process		-14
SLP-3	Complete	New Maintenance Shed	3	Finish	17	SLP	Soilwork Process		-7

Project Processes Page - Filters button and Chip Filters

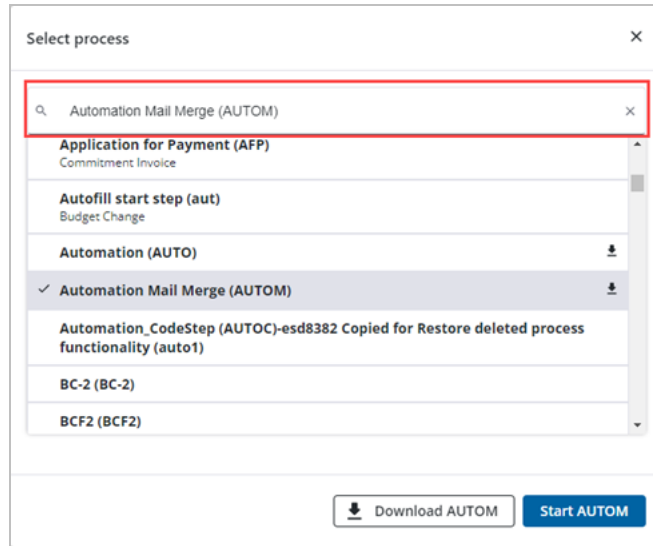
The following fields and buttons are available on the **Project Processes** page:

- **Refresh results**  : When this button is clicked, the results for the selected filters are refreshed.
- **Filter by:** Enter text in the **Filter by** field to filter records and return results containing the specified search keyword criteria.
- **Filters:** Click the **Filters** button to open the panel. Within the **Filters** panel, click **X** to close it. To reset all the filter selections back to the default, click the **Reset** button in the **Filters** panel. Each filter that you select from this panel is displayed as a chip on the **Project Processes** page. Only one option button can be selected at a time but one or more check boxes can be selected at one time, if needed. The number of filters that are currently applied are displayed as a number on the **Filters** button.

Filters Panel

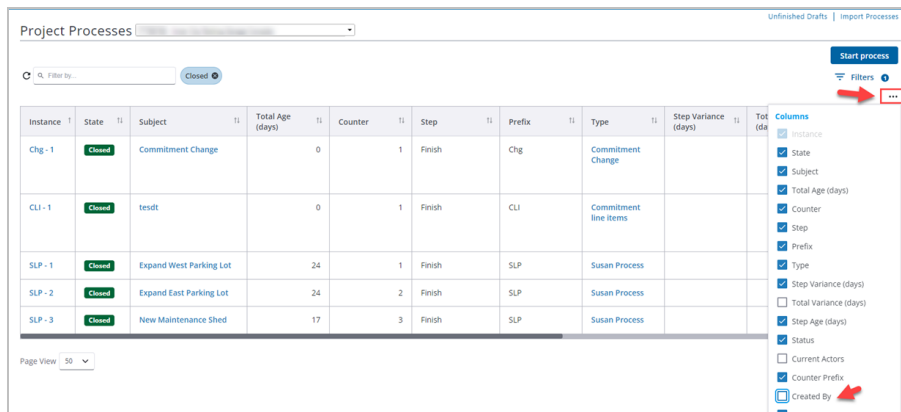
The following fields are available in the **Filters** panel:

- **Process:** Enter or select a specific process type to filter records by. The type of process selected in this field determines the buttons that display on the page and the statuses or steps available.
 - **All Processes:** Select this option to filter by all processes including processes in your court, processes you initiated and all processes.
 - **In My Court:** Select this option to filter by processes in your court.
 - **Initiated By Me:** Select this option to filter by processes you initiated.
 - **Draft:** Select this check box to filter for draft processes.
 - **Open:** Select this check box to filter for open processes.
 - **Closed:** Select this check box to filter for processes that have been closed.
 - **Status:** Enter or select a specific process status to search for and filter records by. If no Process Type is selected, then the Status list will display all Process Status Options from the process setup. Once a specific Process Type is selected, then the list is narrowed to the account defaults and the statuses included in the process design.
 - **Step:** Enter or select a specific process step to search for and filter records by. Note that you will be able to select a step only after selecting a specific process type.
- **Start New Process Instances:** Use either of the following methods to start a new process instance:
 - **Start a process:** To start a new process instance, click the **Start Process** button. In the **Select Process Window** that is displayed, enter search criteria in the search box, select a process and then click **Start**.



Search box in the Select Process Window

- **Start a selected process:** When a process type is selected from the **Filters** panel, the **Start <selected process>** button will be available on the **Project Process** page.
- **Select display columns:** Click the **☰** icon to access a list of available columns and then select which columns to display in the grid by selecting or clearing the check boxes.



- **Grid:** You can perform the following grid display actions on this page:
 - **Sort:** Sort the rows by clicking on the sorting arrow icons in any column header.
 - **Resize Column Width:** Click and drag the borders of any column header to re-size the column.
 - **Reorder Columns:** Click and drag column headers to change the order of the columns.
 - **Page View:** Select the number of rows to display per page from the **Page View** drop-down list.
 - **Navigate through Pages:** When multiple pages of results are available, you will be able to click a page number to move to it.

Tip: You can change the Display Density settings to adjust the amount of white space that appears between each row in the grid on this page. (*Setup > My Settings > Preferences > Interface Settings*)

Processes Tab

- **Processes Table:** This table displays the results of your filter. This table lists detailed information about the process, including the process name, subject, in which step it's in, its duration in the current step, the due date and status. Processes that are grayed out are completed and those whose titles are in blue are currently active. Click the process number or subject to open the Process Details page.
- **Print:** This button is displayed only if there is an active process details mail merge template assigned to the selected process type. To print process details, select the check box next to the desired process and then click print for a printed copy of the process.
- **Log:** If a process log mail merge template is not assigned to this process, the default template is used. To print a process log, select the check box next to the desired process(es) and then click Log to generate a Microsoft Word® version of the process log. Please note that specific line items are not available in the process log. If available, the log includes merged data fields and comments.

Note: Your e-Builder administrator can customize the process log mail merge template, if you have a need for additional fields please contact your e-Builder administrator.

Reports Tab

- **Reports Tab:** Click this tab to access a list of reports that have been generated for the selected process type.
- **Add Report:** Click this button to launch the Report Wizard and add a new report.

Start Processes

You can start processes that have been configured for your account. You can also configure your workflow process so that it can start offline.

To start a process

1. Click the **Processes** tab located at the top of the page.
2. Choose a project from the **All Projects** menu.
The Project Processes page is displayed.
3. Click **Start Process**.
The Start Process window is displayed with a list of all available processes for this account.

To start a process on a project

1. Start a process.
2. On the Start Process window, click the name of the process you want to start.
3. Complete all required data fields.
4. Depending on your account settings, you can optionally attach documents, process, forms, or viewpoints to the process.
5. To finalize the process, take any of the following actions:

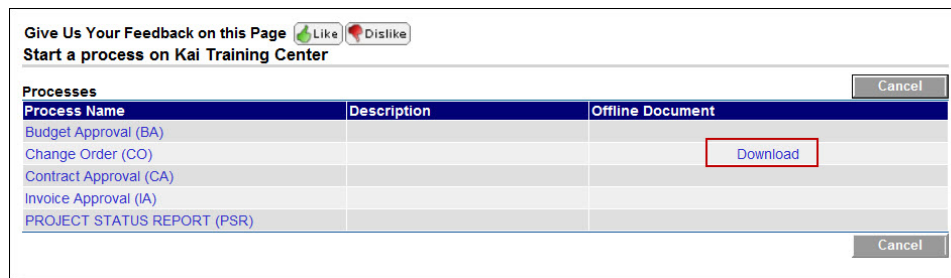
- Click **Submit** to submit the process step.
- Click **Print** to print the select tab.
- Click **Save Draft** to save changes to the process step and return to the item later.
- | **Note:** After 5 minutes of inactivity, the process will be autosaved as a draft.
- Click **Cancel** to close this window and cancel this action. All unsaved data will be lost

To start an external workflow process

Internal e-Builder user:

1. Start a Process.

The Start a process window is displayed. All workflows configured for offline initiation have a **Download** link in the Offline Document column.



2. Click the **Download** link.
3. Save this file to your computer.

 | **Note:** You can save the file either as a (.doc) or a (.docx) file.

4. Email this file to the external process participant so that they can start the process workflow.

External Participant:

5. Open the process document and complete the necessary fields.
6. Save the file.

 | **Note:** Save the file either as a .doc or a .docx file.

7. Email it to the address located in the directions section at the end of the document.

The workflow process will be initiated and updated in e-Builder, ready for action to be taken on the next step in the workflow.

Unfinished Drafts Page

This page allows account administrators and users with the appropriate permissions to see and take action on draft forms and processes. Draft processes and forms are created for many different reasons. At times, team members do not remember to use a draft process and create a new one or co-workers who are unable to see the draft processes/forms of others do not know the draft exists and submits a new process for the same item. Permission settings to view drafts are located in the properties of the form and process, see the following links for more information:

- View Draft Forms Permission
- View Draft Processes Permission

To access the Unfinished Drafts page

1. Click the **Processes** tab located at the top of the page.
2. On the top-right corner of the tab, click **Unfinished Drafts**.

Fields and button descriptions

- **Show**: Narrow the results in the table below it. All processes / forms are selected by default. Make a selection to see drafts for a specific process / form.
- **Project Name**: Name of the project associated with the draft form / process.
- **Form Type**: Name of the form type.
- **Process Type**: Name of the process type.
- **Subject**: Subject of the draft form / process.
- **Created By**: Name of the person who created the draft form / process.
- **Date Created**: Date the draft was created.
- **Type**: Indicates whether the form is a workflow or static form. Workflow forms are routable and facilitate two-way communication. Static forms cannot be routed - they are used mainly to disseminate information. To learn more, see About Forms.

Working with Process Instances

Depending on your access rights (actor or non-actor) the system will determine what you can action on a process. All actors on the process must complete required fields before any actions can be taken.

To access the Process instance page

1. Click the **Processes** tab located at the top of the page.
2. Choose a project from the **All Projects** menu.
The Project Processes page is displayed.
3. Filter for the process whose details you want to view.
4. Click the process number or subject of the process you want to access.
The Process instance page is displayed.

On the Processes page, you can click to view a process. To view only the processes for a project, select the project from the drop-down list.

To take action on a process

1. Access the Process instance page.
2. Complete all required data fields.

3. Depending on your account settings, you may or may not have the option to take any of the following actions:
 -
 4. Before finalizing the process step you can take any of the following actions:
 - Click **Check Spelling** to check the spelling of the selected tab.
 - Click the **Show Routing History** link to view the routing history of this process step.
 - Click the **Show Workflow Diagram** link to view the workflow diagram of this process.
 - Click **Print** to print the select tab.
 - Click **Save** to save changes to the process step and return to the item later.
 - Click **Cancel** to close this window and cancel this action. All unsaved data will be lost.
-

Troubleshooting Code Step Errors

If a Code Step error is displayed, make sure that you read the most recent comment on the Comments tab for more details or instructions on resolving the error. After resolving the error, click the **Retry Code Step Execution** button in the Error message to proceed.

Note: If you click the **Retry Code Step Execution** button before resolving the current error, a new error will be generated and added as a new comment on the Comments tab.

Mail Merge - Combined Attachment Size Limit

While executing automated steps, a Mail Merge error may be caused by large total upload size exceeding 300 MB. e-Builder User Guide will check the combined file size of all attachments and display an error if the combined file size exceeds 300 MB.

Note: This limit does not apply to the manual Mail Merge Templates option.

As a workaround, you can use the Print feature to download the files instead. Note that the files can only be printed if they are viewable in PDF format.

To print attached documents

1. On the process instance details page, click the **Print** button. The Mail Merge Templates popup is displayed.
2. To use a template, select the **Merge Templates** option and select a template from the drop-down list.
3. Select the **Print Attached Documents** check box to download the files to your computer.
4. To proceed, click **Print**. The Document Print Options window is displayed. You can reorder the files here, if needed.
5. Click **Print**.

Note: If the output file exceeds 50 pages, you may be asked to confirm the file download by clicking **OK**.

Fields and Buttons

Below are descriptions of the fields and buttons located on this page.

Toolbar / Actions

- **Accept/ Decline:** The option to accept or decline to act on a process step is only available if there are multiple actors on the step. If you click Decline, the process step will no longer appear in your court.
- **Workflow Override:** This button is displayed only for administrators and users with Manage Workflow permissions. Click this button to override the step and move the process instance to another step in the process.
- **All Fields View:** This button is displayed for administrators and users with Manage Workflow permissions only. Click this button to view a list of all data fields and their values for the process.
- **Show History:** Click this link to open the Routing History page and view an audit trail of the process.
- **Show Workflow Diagram:** Click this link to view the workflow diagram. The current step will be highlighted.
- **Current Actors:** Click this link to view current actors on the process steps.
- **Take Action:** Click the drop-down arrow to the left of this field to select an action to take, and then click this button to take the action. Taking action will move the process to the next step in the workflow.
- **Check Spelling:** Click this button to check the spelling of data fields on this page.
- **Submit:** Click this button to complete the start step when initiating a process.
- **Forward:** This button only appears if the step has been configured for flexible routing by your account administrator. Click this button to forward the process to another user on the project.
- **Reply:** This button is only displayed if the step has been configured for flexible routing by your account administrator. Click this button to reply to the user on the project that forwarded the process to you.
- **Print:** Click this button to print the process step. Based the settings for this step, this button may or may not appear. For more information, on disabling the printing option for a process step, see Edit Step Page Overview.
- **Copy:** This button is displayed for processes that are already in progress. Click this button to duplicate the process instance. This capability allows you to carry over existing, reusable information, reducing data entry efforts. Once a process instance is copied, data entry fields are copied as well, such as custom fields, data fields, company and contact information and reason codes. If this is a cost process, all cost data is also carried over with the exception of line items and dynamic line items.
- **Delegate:** Click this button to delegate the current step to another user on the project.
- **Save:** Click to Save the current filled out data and return to it at a later time.
- **Delete Draft:** This button is available only for account administrators, the process initiator and users with the permissions to access draft processes. Click to delete the draft. To learn more about managing draft processes, see View Draft Processes Permission.
- **Cancel:** Click this button to cancel the current action. All unsaved data will be lost.

Details tab

The Details tab lists all data fields for the process.

Note:

- If you're an actor on the step, required fields must be completed before you can take an action on the step.
- File fields may or may not include a thumbnail of the attached file. Administrators can choose to show thumbnail images by selecting the Show Attachment Thumbnail check box on the File Data Field Properties page. For instructions on accessing this page, see Add Data Fields.

Comments Tab

Displays a list of comments added to the process in chronological order. Date and time stamps are also included. The Comments tab also displays comments containing more details or instructions to resolve any code step errors.

If a comment was entered by a user (commenter) on behalf of another (delegator), the user IDs of the commenter and the delegator will be displayed.

Note: The commenter will not be able to delete their comment once they have left the delegation session. However, the delegator is able to delete the comment left by the commenter.

If a document or process is attached, it also can be referenced here. From here you can also add and request comments.

Attached Documents Tab

From this tab you can download and view a list of documents attached to the process. You can also attach documents as a reference or supporting evidence, such as a sketch, plan, specification, or budget.

Attached Processes Tab

On this tab, you can attach or view a list of processes attached to the process.

Attached Forms Tab

This tab will only appear if the Forms module is enabled on your account. Click the Attached Forms tab to view a list of forms attached to the process. You can also attach forms as reference or supporting evidence.

Attached To Tab

Displays a list of processes that this process is attached to.

Accept/Decline Process Step

The option to accept or decline to act on a process step is only available if there are multiple actors on the step.

If you are a potential actor on a step (a user that can take action) and there are more than one potential actors, then each of you can choose to accept or decline ownership of the step. Accepting or declining a process step lets other potential actors know of your intentions. This feature is strictly informative; you do not have to accept or decline the step to take action on it. If all other potential actors have declined the step and you are the last one then you can only accept taking action on the step.

Process steps with the option for you to accept or decline are displayed in your court on the Home tab. When you decline taking action on a step, the item is no longer displayed in your court. When you accept or decline to take ownership of a process step, e-Builder automatically tracks the date and time in the Routing History.

Tip

To see who else has accepted or declined this process step, click the **Show Routing History** link, click the **Step Name**, and then click the **Actors** tab.

To accept or decline to act on a process step

1. Open the Process Instance page.
2. Click **Accept** or **Decline**, which is located in the upper left-hand corner of the page.

Take Action on a Process

To take action on a process step

1. Open the Process Instance page.
2. Click the drop-down arrow located to the left of the **Take Action** button and make a selection from available options.
3. Click **Take Action**.

Note:

- You are not required to click the **Take Action** button if the process has been configured to allow the action to take place by simply making a selection from this drop-down menu. For more information on this setting, see *Workflow Properties Page Overview*.
 - If this action requires you to electronically sign a document, the signing process instance page will appear.
4. **If:** You are prompted to comment and select reviewers:
Enter comments. If applicable, choose whether to make your comments private by selecting the **Private** check box, select reviewers from the **Available Users** box, and then click **Add**. Click **Yes, [action name]** to send comments and request reviews.

5. **If:** You are prompted to vote:
Click **Vote for [Action Name]** or **No, Cancel**. If you are an administrator, you have the option to override the number of actors needed to complete the action.

Electronically Signing (e-Sign) Documents

Once a process step is configured with a signing action, this action will be listed in the Action drop-down menu for you to select.

Note: Only PDF files can be electronically signed.

To electronically sign a document in Adobe Acrobat Sign

1. Open the Process Instance page.
2. Complete all necessary fields.
3. Click the Action drop-down arrow and select the signing action.

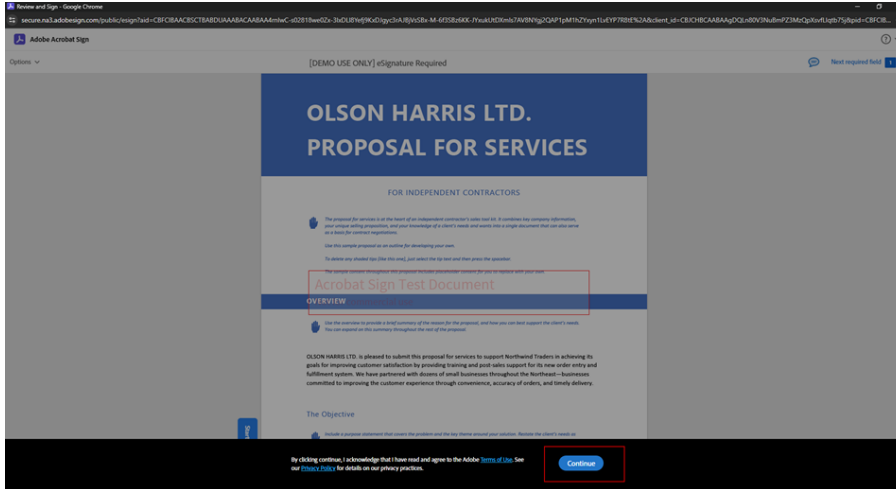
Note: Step names are configurable; therefore, the name of this step will be different for every user.

4. Click **Take Action**.

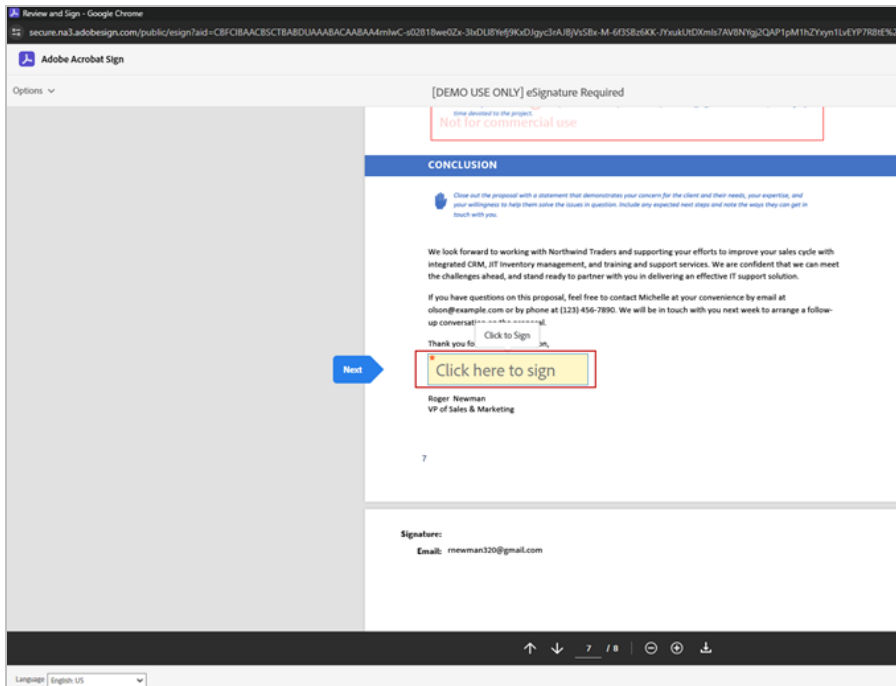
A message prompting you for an electronic signature is displayed.

Note: You are not required to click the **Take Action** button if the process has been configured to allow the action to take place by simply making a selection from this drop-down menu. For more information on this setting, see Workflow Properties Page Overview in the Online Help.

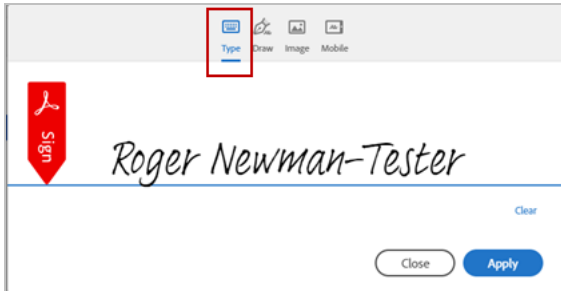
5. Click the link, **Click here to review and sign your document(s)**.
6. Click **Continue** to agree to Adobe's terms of use.
This opens an agreement signing session in Adobe Acrobat Sign.



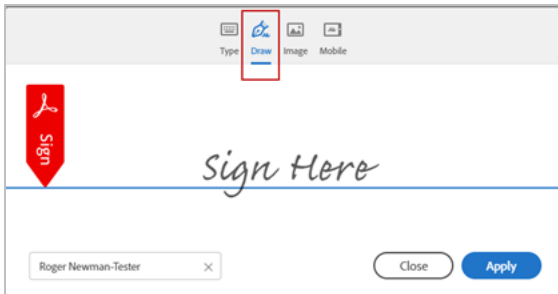
7. Click **Start** to navigate to the location where your signature is necessary.
8. Click to sign at each e-Signature location in the agreement.



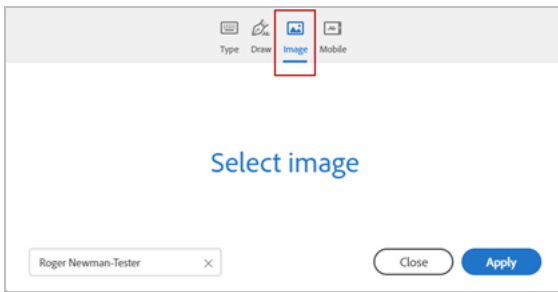
9. Select **Apply** once you determine your preferred method to e-Sign. You can type your name, draw your signature or select a signature image from your computer or use your mobile device to easily draw or capture your signature.



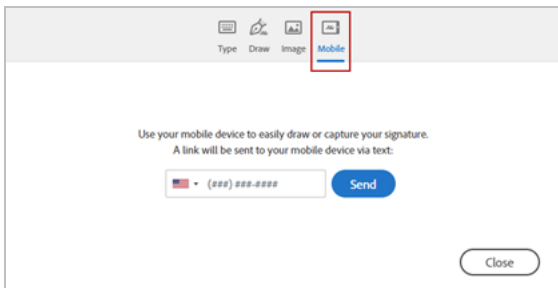
Type Name Option



Draw Signature Option

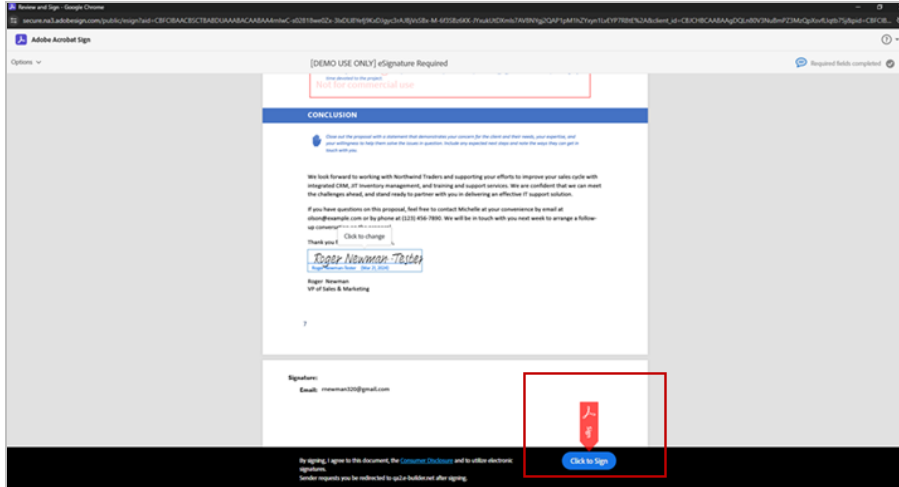


Select Signature Image Option



Use Mobile Device Option

- Click the **Click to Sign** button to end the signing session.



Ending the Signing Session

A success message will be displayed on the e-Builder page.

- Click **Continue** to complete this step and send the process to the next workflow step.

To electronically sign a document in DocuSign

- Open the Process Instance page.
- Complete all necessary fields.
- Click the Action drop-down arrow and select the signing action.

Note: Step names are configurable; therefore, the name of this step will be different for every user.

- Click **Take Action**.

A message prompting you for an electronic signature is displayed.

Note: You are not required to click the **Take Action** button if the process has been configured to allow the action to take place by simply making a selection from this drop-down menu. For more information on this setting, see Workflow Properties Page Overview in the Online Help.

- Click the link, **Click here to review and sign your document(s)**.
- Click **Review Document**.

The file opens in DocuSign.

- Review and locate where your signature is necessary.
- Drag and drop your signature from the **Signature Context** menu.

Note: This context menu displays by default, but should you need to reopen it, click the pencil icon



- Click **Finish**.
You are prompted for confirmation.
- Click **Yes**.

A success message displays on the e-Builder Process Instance page.

11. Click **Continue** to complete this step.

Forward Process Step

The ability to forward a process instance may or may not be available on a process step depending on process settings. If your e-Builder administrator enabled flexible routing, then the Forward option is available, otherwise you are not able to forward the process step. You can only forward to non-actors on the step. You are not restricted on taking action on the step while you wait for a reply from the recipient.

To forward a process step

1. Open the Process Instance page.
2. Click **Forward**.
The Forward Process page is displayed.
3. Click the **Select Recipient** drop-down arrow and select a recipient.
4. If applicable, to make your comment private, click the **Private** check box.
5. Enter your comment in the **Comment** box.
6. Depending on your account settings, you can optionally attach documents, process, forms, or view-points to the process.
7. Click **Forward**.

Comment / Request Comments on Processes

Comment on Processes

To comment on a process, the process does not need to be in your court. That means you can add a comment any time, even when the process step is closed. Both actors and non-actors have the ability to comment on a process step.

To add a comment

1. Open the Process Instance page.
2. Click the **Comments** tab.
3. Click **Comment**.
The Add Comment dialog box displays.
4. Enter your comment in the **Comment** box.
5. Depending on your account settings, you can optionally attach documents, process, forms, or view-points to the process.
6. Click **Add Comment**.

Request Comment on Processes

Only actors on the step can request comments. Comments can be requested from internal e-Builder users or external project participants who may not have access to the project via e-Builder.

To request comments

1. Open the Process Instance page.
2. Click the **Comments** tab. For detailed information about the fields located on this page, see below.
3. Complete all required fields.

Tip

When adding external participants to the message, use your keyboard to auto-fill the desired email addresses. Begin typing the recipient's name or email address then use the arrows to highlight the email of choice, and then click **Tab** to make the selection.

4. Click **Request Comment**.

Request Comment Field Descriptions

Below are descriptions of the fields and buttons located on this page:

- **Request Comment:** Click this button after all fields have been completed and you are ready to send the request for comment.
- **Cancel:** Cancels the comment request and close this window. All data will be lost.
- **Select from Users on Project:** Select the users you wish to request a comment from, and then click the right arrow to add them to the adjacent box.
- **All Users:** Use this drop-down section to narrow down the list of users by user role.
- **Enter External Users Email:** You have the ability to request comments from external project participants who may not have e-Builder access. Enter their e-mail addresses (one per line) in this box. If these participants are saved in the project's contact list, you can click **Lookup** to search for them or begin typing the recipient's name or email address to use the auto-fill feature.

Tip

Use your keyboard to input this field. Start typing the recipient's name or email address then use the arrows to highlight the email of choice, and then click **Tab** to make a selection.

- **Allow external users to attach files?** Select this check box to allow external users to attach files with their comment. When selected, you are prompted to select a folder that recipient's files will be loaded into.
- **Respond By:** Enter a date by which recipients should respond by. Click the Calendar icon to select a date from the calendar.
- **Message:** Enter a message to accompany the request for comments.
- **Private:** If this option is available to you, select or clear the **Private** check box to make your comment either private or public.

Note: The Private Comments feature can be enabled by account administrators. This feature allows only users in select roles to view and add private comments. For more information, see [Manage Private Comments](#).

Attach to a Process

Attach Documents to a Process

Depending on your account settings, you may be able to attach documents to a process. The user who attached the documents, an administrator or anyone with manage document permissions can remove the attached documents.

To attach documents to a process

1. Open the Process instance page.
2. Click the **Attached Documents** tab.
3. Click **Attach Documents**.
4. To upload a file from your computer:
 - a. Click **Upload from your Computer**.
 - b. Select a destination folder and click **Select**.
 - c. Click **Browse** to search for files to upload or drag and drop a file from your computer.
 - d. Click **Done**.
5. To select a file from the project's Documents module:
 - a. Click **Select from Documents Module**.
 - b. Select the file(s) and click **Attach**.

To remove attached documents from a process

1. Open the Process instance page.
2. Click the **Attached Documents** tab.
3. Select the check box next to the form you want to remove, and then click **Remove Documents**.

Note: For process instances that have already been submitted (not drafts), the word "Removed" is displayed in parentheses next to the document title, indicating that it was removed from the process. You're able to reattach the document by clicking the **Reattach** link located underneath the title of the document.

Attach Processes to a Process

Depending on your account settings, you may be able to attach processes to a process. The user who attached the processes, an administrator or anyone with manage process permissions can remove the attached processes.

To attach processes to a process

1. Open the Process instance page.
2. Click the **Attached Processes** tab.
3. Click **Attach**.
The Attach Processes page is displayed.
4. Filter for the processes you want to see.

Results are displayed in the table below.

5. Select the check box next to the processes you want to attach.
6. Click **Attach**.

To remove attached processes from a process

1. Open the Process instance page.
2. Click the **Attached Processes** tab.
3. Select the check box next to the form you want to remove, and then click **Remove** .

Note: For process instances that have already been submitted (not drafts), the word "Removed" is displayed in parentheses next to the process title, indicating that it was removed from the process. You're able to reattach the process by clicking the **Reattach** link located underneath the title of the process.

Attach Forms to a Process

Depending on your account settings, you may be able to attach forms to a process. The user who attached the forms, an administrator or anyone with manage form permissions can remove the attached forms.

To attach forms to a process

1. Open the Process instance page.
2. Click the **Attached Forms** tab.
3. Click **Attach**.
The Attach Forms page is displayed.
4. Filter for the forms you want to see.
Results are displayed in the table below.
5. Select the check box next to the forms you want to attach.
6. Click **Attach**.

To remove an attached form from a process

1. Open the Process instance page.
2. Click the **Attached Forms** tab.
3. Select the check box next to the form you want to remove, and then click **Remove Forms**.

Note: For process instances that have already been submitted (not drafts), the word "Removed" is displayed in parentheses next to the forms title, indicating that it was removed from the process. You're able to reattach the forms by clicking the **Reattach** link located underneath the title of the forms.

Delegate a Step in a Process

If you are an actor in a step, you can choose to delegate a step in a process to another project participant. You can only delegate if there is not an action that requires a vote (or requires a majority or all to vote on the action to execute it).

You may choose to delegate a step because you do not have the time to address the item or could use some help to address it. When you delegate the step, you are granting this user to be a temporary actor. In other words you have given this other user absolute rights to act on your behalf as an actor.

Note: The ability to delegate steps is only available if your e-Builder Administrator has enabled this feature in the Administration Tools (Processes > Manage Processes > Properties tab > Enable the Ability to Delegate Work)

To delegate a process step to another user on the project

1. Open the Process instance page.
2. Click **Delegate**.
The Delegate Full Authority page is displayed.
3. Click the **Select a Role** drop-down arrow to select the role that the delegate belongs to.
4. Click the **Select a User** drop-down arrow to select the delegate.
5. Click **Delegate Authority**. The delegate receives an email notification and can take action on the process. The subject of the email contains DELEGATED

View Routing History

Users have the ability to view the routing history for the process steps that they have access to. The routing history of a process step includes the actors that have taken action on each step of the process thus far. You can view the action taken and the date and time stamp when it was completed. The age of the step and current status is also available.


To view routing history

1. Click the **Processes** tab located at the top of the page.
2. Choose a project from the **All Projects** menu.
The Project Processes page is displayed.
3. Filter for the process whose details you want to view.
4. Click the process number or subject of the process you want to access.
The Process instance page is displayed.
5. Click the **Show History** link located directly below the process document title.

Routing History Page Field Descriptions

The fields and buttons located on this page are:

Toolbar Buttons

- **Show Workflow:** Click to view the workflow diagram. The current step will be highlighted.
- **Cancel:** Click this button to cancel the current action and close out of this page.
-  **Export to Excel® icon:** Click to export the steps and/ or data history table to an Excel spreadsheet.

Details

- **Name:** The name of the process.
- **Status :**The current status of the process.

Steps

This section lists step details for all the steps that the process has gone through up until now.

- **Step Name:** Click the step name to view step-specific routing history. A separate window opens that includes an Actors tab, which offers additional information about the actors involved in the step, the actions they've taken and whether or not they've accepted or declined the step. From here, click the **Show Full History** button to return to the previous page.
- **Actor:** This field lists the actor in the step. If multiple actors exists on the step, click on the **Current Actors** link to view all actors and the actions they took.
 - Note:** The word (removed) appears next to actors that have been removed from the role, project, or account.
- **Due Date:** The step due date.
- **Completed:** The date and time the step was completed.
- **Age(d):** The amount of days this step has been in progress.
- **Status:** The current status of the step.

Tabs

- **Data Fields:** Displays the changes performed on the fields, including the old and new values, the user who performed the edit, or the user who performed the edit on behalf of another user (access delegation).
- **Comments:** Displays comments added by users, including those entered on behalf of the user through e-Builder's access delegation feature. Also includes actions taken in the process as well as attached documents.

View Process History

The Process History tab captures every detail of every action taken on a process. It also captures who viewed a process instance and when workflow overrides were completed. These details are especially important for cost and approval related actions. In addition, these records can also be exported and printed from this page.


To access the Process History page

1. Go to the Process Details page.
2. Click the **Show History** link located on the Process Instance page.
3. On the Routing History page, click the **History** tab.

View Process History Field Descriptions

Below are descriptions of the fields and buttons located on this page.

Toolbar Buttons

- **Show Workflow:** Click to view the workflow diagram. The current step will be highlighted.
- **Cancel:** Click this button to cancel the current action and close out of this page.
-  **Export to Excel® icon:** Click to export the steps and/ or data history table to an Excel spreadsheet.

Details

- **Name:** The name of the process.
- **Status:** The current status of the process.

History

This section lists step details for all the steps that the process has gone through up until now.

- **Name:** Displays the name of the person that took action on the step.
- **Company:** Displays the company name associated with the person that took action on the step.
- **Time Step:** Displays the date and time the action was taken.
- **Step Name:** Displays the name of the step the action was taken on.
- **Access :** Displays the method in which the step was accessed.
- **Description:** Displays a description of the action taken.

View Workflow Diagram

The workflow diagram is available for you to see the process in its entirety. While working on a process step, as the actor (or non-actor) you are taking action on a specific step that is part of a larger process. The workflow diagram can be viewed from two pages within the Processes module:

- Process Instance Page: Click the **Show Workflow Diagram** link.
- Routing History Page: Click the **Show Workflow** button.

Print Process Information

Printable process information is based on the mail merge templates created by your e-Builder administrator. You have the ability to print process details, which includes line item information and process logs, which do not include specific line items.

To print process details

Note: The Print button is only displayed if there is an active process details mail merge template assigned to the selected process type.

1. Access the Project Process page.
2. Filter for the process type you want to print.
3. Select the check box next to the desired process(es).
4. Click **Print**.

A Microsoft Word® document displays with the selected process information.

To print process logs

1. Go to the Project Processes page.
2. Filter for the process type you want to print.
3. Select the check box next to the desired process(es).
4. Click **Log**.

A Microsoft Word® document displays with the selected process information.

Import Processes

e-Builder's Import Process Wizard guides you through the process instance import steps, letting you easily map the data in the import file to the data fields in e-Builder and preview the results prior to finalizing the process import. This eliminates the need for duplicate data entry.

Import File Requirements

MS Excel files are supported while importing processes. To determine the fields or columns that need to be included in the import file, use either of the following methods:

- If you are a first time user who has Import Process permissions, you will need to upload any MS Excel file in Step 1 of the Import Wizard in order to advance to the next step. On Step 2, which is the Import Field Mappings step, all available fields that can be mapped using the Import Wizard will be displayed. Then you can map these fields in the MS Excel file.
- The other method for understanding what fields/ columns may be included in the Excel file, without actually uploading an Excel file, would be to run a Standard Report of type "Process Log" and then select the specific process you wish to import. That will then allow you to advance to the Select Columns step of the Standard Report wizard where a list of all process fields which may be mapped via the Process Import will be displayed.

Note: The MS Excel file being uploaded on Step 1 of the Import Process Wizard is not required to include the same exact column names. You will be able to map any header fields in the Import File to the available Process Data Fields. However, our best practice recommendation for the Import File is to copy and paste the exact Process Data Field names into the header row of the Excel file, so that when Step 2 of the Import Wizard loads, it will already have mapped the import file header names to the Process Data Fields on a one-to-one basis.

You can import processes and processes with Cost for different projects.

Import budget change rules

To import processes

1. Click the **Processes** tab located at the top of the page.
2. On the Processes page, click **Import Processes**. The Import Processes wizard is displayed.
3. On Step 1: Select Import File, select the file to use in the import. The fields visible in Select Process Type to Import section are:
 - **Project Identifier:** Select a project number custom field from this drop-down list. Project numbers offer an additional way for users to identify the project when your organization may use other project classifications. The options available in this drop-down list have been configured in

- the Project Settings page by Administrators.
- **Process Level:** Select either of the following process levels:
 - **Account:** Select this option to choose an account level process.
 - **Project:** Select this option to choose a project level process.
 - **Project:** Select a project to filter process types and narrow down the process list. This drop-down list becomes active only when Project option is selected in the Process Level field.
 - **Process Type:** Select a process type. This drop-down list becomes active when either account or project options are selected in the Process Level field. Additional fields may be displayed depending on the type of process selected in this field.
 - **Create as Draft:** Select this check box to create the imported process instance(s) as a draft without submitting it.
 - **Read-only Field Updates:** Choose either of the following options to define the updates made when values differ from existing ones:
 - **Results in exception and process data will not be imported:** Select this option so that any results in exception and process data will not be imported.
 - **Shows warning and all process data will be imported and/ or overwritten:** Select this option so that all process data will be imported and/ or overwritten after displaying a warning message.
 - **Import file:** Click **Choose File** to browse for and select the file.
4. Click **Next** to move to the Step 2 of the Import Wizard.
 5. On Step 2: Fields Mappings, the following Process Header fields can be mapped.
 - **Process Built-In Fields:** In this section, select the fields to be mapped to the process fields. Note that some fields may be required.
 - **Process Data Fields:** The Process Data Fields vary based on the process selected. Map the files as per your requirements.
 6. Click **Next** to move to the Step 3 of the Import Wizard.
 7. On Step 3: Review, go through the Import File Summary and preview the Process Built-In Fields and Process Data Fields. Any exceptions and warnings will also be displayed at this step and you can resolve them by re-importing the file if needed.
 8. Click **Import**.
A confirmation message is displayed after the processes are imported successfully.

Working with Lookup Processes

Lookup processes are configured by the account administrator. They link primary and dependent processes to one another. In many cases e-Builder workflow processes are connected and flow from one to another through the project life cycle. Lookup processes allow you to see with ease if, for example, a change order is tied to a potential change order, and if that potential change order is linked to one or more RFIs so that it is clear what led to the change order. E-Builder provides you with a way to view primary processes that are linked to depend-

ent processes from both the Primary process page and the Dependent process pages. For every Primary process, there is a list of all its dependent process data-field combinations, along with functionality so that you can directly add a new dependent process or attach an existing dependent process.

The following are actions you take regarding lookup processes:

- View Linked Processes
- Add New Dependent Process
- Attach Existing Dependent Process

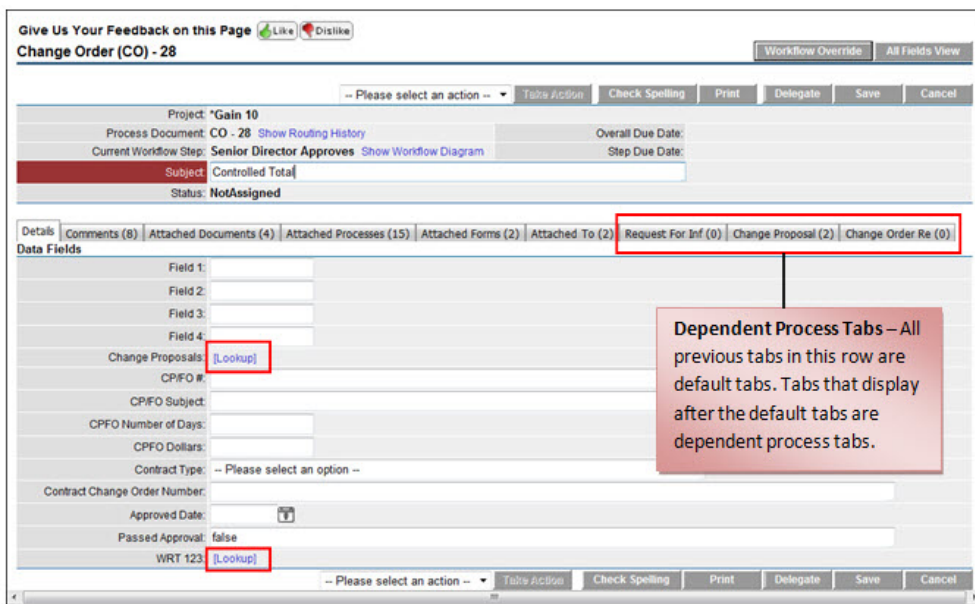
For account administrators who wish to configure lookup processes, see Set up Lookup Processes.

View Linked Processes

To view linked processes

1. Go to the Project Processes.
2. Filter for the primary process type you want to view.
3. Click the process number or subject of the process you want to view.

The process details page displays with tabs of dependent processes.



4. You have the option to take any of the following actions:
 - Click the **Lookup** links to attach a data field that supports the primary process, i.e. select from a list of proposed change orders.
 - Click any of the dependent process tabs to add a new dependent process or attach existing dependent processes.

Add New Dependent Processes

Only actors on the step can perform this action. Depending on the level of permissions a user has, you can add a new dependent process from any of the dependent process tabs. Dependent processes such as potential change orders might be added change orders as supporting evidence.

To add new dependent processes

1. Go to the Process instance page.
 2. Click the dependent process tab.
 3. Click **Add New**.
- The Start Process page is displayed.
4. Enter all required fields.
 5. Click **Submit**.

The dependent process you just added appears on the dependent process tab.

Note: After this task is complete, you can take any of the following actions to finalize the process step:

- Click **Check Spelling** to check the spelling of the selected tab.
- Click the **Show Routing History** link to view the routing history of this process step.
- Click the **Show Workflow Diagram** link to view the workflow diagram of this process.
- Click **Print** to print the select tab.
- Click **Save** to save changes to the process step and return to the item later.
- Click **Cancel** to close this window and cancel this action. All unsaved data will be lost.
- Take an Action
- Delegate Process Steps (Only actors are able to perform this action. This action may or may not be available, depending on the process settings)

Attach Existing Dependent Process

Only actors on the step can perform this action. Depending on the level of permissions a user has, you can add an existing dependent process from any of the dependent process tabs.

To add existing dependent processes

1. Go to the Process Details page.
 2. Click the dependent process tab.
 3. Click **Attach Existing**.
- The Filter Process page is displayed.
4. Filter for the dependent process(es) you want to add.
 5. Select the check box next to the process(es) you want to add.
 6. Click **Attach Existing**. The dependent process you just added appears on the dependent process tab.

Note: After this task is complete, you can take any of the following actions to finalize the process step:

- Click **Check Spelling** to check the spelling of the selected tab.
- Click the **Show Routing History** link to view the routing history of this process step.
- Click the **Show Workflow Diagram** link to view the workflow diagram of this process.
- Click **Print** to print the select tab.
- Click **Save** to save changes to the process step and return to the item later.
- Click **Cancel** to close this window and cancel this action. All unsaved data will be lost.
- Take an Action
- Delegate Process Steps (Only actors are able to perform this action. This action may or may not be available, depending on the process settings)

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 x Target Date x

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.

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 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.

	Account Role	Project Role
		✓
on	✓	
pot	✓	
		✓
		✓

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 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 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

About Project Issues

The Project Issues feature gives inspectors a quick and easy way to log the violations they encounter on construction sites. Project Issues facilitates the communication and exchange between the inspector, contractor/subcontractors, and the project manager. With the mobile application, inspectors are able to record and send issues to contractors, with just the click of a button. The contractor can then assign these issues to subcontractors for further action. Having a single system that allows all parties to collaborate on the inspection process helps reduce the time it takes to inspect a site, which essentially reduces project costs.

Supporting features have also been added, such as the ability to predefine locations for the inspector's convenience. Contractors, administrators and inspectors can also flag issues that they see occur often, to eliminate the repetitive input of similar issues. The collaborative aspect of this feature results in increased efficiency and speed. It also adds convenience, flexibility and practicality to the inspection process for all parties involved.

Setup Process

As part of the setup process, project managers must first create "project issue" form types, otherwise the Project Issues link won't be accessible from the Project Menu. A list of locations should also be created for the inspector to log issues for. Project managers can flag recurring issues during the setup process or they can be saved in an ad hoc fashion, by the inspector.

Below is a list of configuration steps that should be completed in chronological order:

1. Create Project Issues Form(s)
2. Define Project Issue Locations
3. Add Recurring Project Issues (Optional)

Create Project Issues Forms

To get started with Project Issues, you need to first create a project issues form type. This form type differs from the standard e-Builder form in that there are three default field names that cannot be changed one of which is Issue Category. Edit the options of this data field to include your different issue categories. Instructions are provided below.

[To create a project issue form](#)

1. Go to Forms Settings.
For instructions, see Access Forms Settings.

2. Click **Manage Forms**.
3. Click **Create New Form Type**.



The Create New Form Type page is displayed.

4. Complete all required fields, and specifically, the following:
 - o In the **Interpret Form As** field, select the **Project Issue** radio button.

The screenshot shows a form configuration page with the following fields:

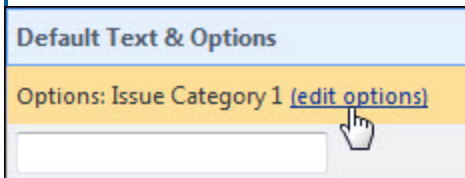
- * Form Type Name:** Electrical Issues
- Description:** (empty text area)
- Default "To":** Please select... (dropdown menu)
- Allow Change To Default "To"?:** Yes No
- Default "CC":** eb Admin, External User, Finance, Fraud Department (list box)
- Allow Change To Default "CC"?:** Yes No
- Interpret Form As:** Standard Form Type Project Issue
- Type of Form:** Workflow (Routable Form) (dropdown menu)

5. Click **Create**.
The Add Form Section(s) page is displayed.
6. Click **Add New Section**.
7. Enter a name and description of the section, and then click **Save**.
8. Repeat steps 6 and 7 to add more sections to the project issue form.
9. Click **Next**. The Add Form Field(s) page is displayed.
10. Enter field names and specify the sections each field belongs to.

Note: The first three field names are required and display by default: Issue Category, Location, and Event Name.

11. Click the **edit options** link to specify issue category options such as *Mechanical, Electrical, and Safety*, for example.

Note: Users will be required to choose an issue category when completing the form.



12. Enter category options, and then click **Save**.

- On the Add Form Field(s) page, specify whether each field is required or optional by selecting the appropriate check boxes.

Required	Editable
<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Click **Next**. The Form Type Permissions page is displayed.
- Specify permissions for accessing this form.

Tip

Click the **Preview** tab to review the form and if necessary, navigate to other tabs to make changes. Once completed, click the **Permissions** tab.

- Click **OK** to save the completed the form.

Access the Project Issues Page

Go to the Project Issues page to filter for project issues in various statuses. From here you are able to take a number of actions with project issues such as adding, forwarding, deleting, closing, sending and much more. The Project Issues module has project-specific access. You can access this module from the Project Menu located on the left side of the page. The Project Menu displays when you are within a project. The procedure below describes accessing the Submittal module before a project is selected.

To access the Project Issues page

- From the Home page, click the **All Projects** drop-down menu to select a project.
- Click the **Project Issues** link located in the Left Navigation Bar.

Add Project Issues

Project issues can be added via e-Builder Mobile or e-Builder Enterprise (web-based application). The procedure below details the steps for adding an issue via e-Builder Enterprise. Typically, this task is performed by the inspector when creating a single issue, not as part of a batch of issues created during an inspection event. In some cases, this task may be performed by the project manager.

To add a project issue

- Go to the Project Issues page.
For more information, Access the Project Issues Page.
- Click **Add Issue**.
The Fill Out Form dialog displays.
- Select the project issue form type you would like to add.
The Fill Out Form dialog displays.
- Complete all required fields.
- Click **Post Form** to send the form.

—Or—

Click **Save Draft** to save the form as a draft.

Save Issue as Recurring

You might choose to save an issue as a recurring issue if you notice the same issue occurring on a regular basis. Recurring issues must have a unique subject within its specific form type in order to be saved. Recurring issues with duplicate subjects will generate an error message.

To save an issue as a recurring issue

1. Go to the Project Issues page.
For more information, see [Access the Project Issues Page](#).
2. Filter for the issue you would like to save as recurring.
3. Click the title of the issue.
The [Form Name] dialog box displays.
4. Complete all required fields.
5. Click **Save Recurring Issue**.

Delete Project Issues

As part of the review of draft project issues, the inspector may need to delete issues that were duplicates or were otherwise flawed in some way. Only draft issues can be deleted.

To delete project issues

1. Go to the Project Issues page.
For more information, see [Access the Project Issues Page](#).
2. Filter for the issue(s) you would like to delete.
3. Select the check box(es) next to the project issue(s) you want to delete.
4. Click **Delete**.

Send Project Issues

After reviewing and confirming draft project issues, the inspector must distribute the items so that they move into the recipient's court. Draft issues can be sent en masse or individually by opening the issue, saving, and then sending it. The following instructions are included below:

Send Single Draft Project Issue

Send Multiple Draft Project Issues

Send Single Draft Project Issue

To send a single draft project issue

1. Go to the Project Issues page.
For more information, see [Access the Project Issues Page](#).
2. Filter for the issue you would like to send.

3. Click the title of the issues you want to send.
[Form Name] dialog box displays.
4. Complete all required fields.
5. Click **Post Form**.

Send Multiple Draft Project Issues

To send multiple draft project issues

1. Go to the Project Issues page.
For more information, see [Access the Project Issues Page](#).
2. Select the My Draft Issues radio button located in the filter.
3. Click **Filter**.

Note: When sending multiple issues, it is important to filter issues My Draft Issues so that the Send button displays on the page. If qualifying issues display in mixed results of both draft and open issues that are not in your court, the Send button will not display. In such as case you can send single draft project issues by following the procedure above.

4. Select the check box next to the issue(s) you want to send.
5. Click **Send**.

Forward Project Issues

Not all project issues can be forwarded. Issues that are able to be forwarded adhere to one or more of the following criteria:

- The issue is in your court
- The issue is closed
- Forwarding is not restricted for the particular issue type

To forward a project issue

1. Go to the Project Issues page.
For more information, see [Access the Project Issues Page](#).
2. Filter for the issue(s) you would like to forward.
3. Select the check box(es) next to the issues you want to send.
4. Click **Send**.

Note: If the Forward button does not display, the project issue does not meet one of the criteria listed above.

Print Project Issues

The print project issue option sends the project issue forms details to a Microsoft Word® file where you are able to take further action such as modifying the document further, saving it, and printing it.

To print project issues

1. Go to the Project Issues page.
For more information, see [Access the Project Issues Page](#).
2. Filter for the issue you would like to print.
3. Click the title of the issue.
[Form Name] dialog box displays.
4. Click **Print**.

Close Project Issues

Once an issue has been addressed by the assignee and the item is marked as completed, the inspector needs to review the resolution/disposition, confirm that the item is completed, and close the item. Issues can be closed individually or en masse. The instructions for each of these tasks are provided below:

Note:

Not all project issues can be closed. Issues that are able to be closed adhere to the following criteria:

- The issue is in your court
- Closing is not restricted for the particular issue type

The following instructions are included below:

Close a Single Project Issue

Close Multiple Project Issues

Close a Single Project Issue

To close a single project issue

1. Go to the Project Issues page.
For more information, see [Access the Project Issues Page](#).
2. Filter for the issue you would like to close.
3. Click the title of the issue.
[Form Name] dialog box displays.
4. Complete all required fields.
5. Click **Close**.

Close Multiple Project Issues

To close multiple project issues

1. Go to the Project Issues page.
For more information, see [Access the Project Issues Page](#).
2. Select the In My Court radio button located in the filter.

Note: When closing multiple issues, it is important to filter by issues In My Court so that the Close button displays on the page. If qualifying issues display in mixed results of both draft and open issues, the Close button will not display.

3. Click **Filter**.
4. Select the check box(es) next to the issue(s) you want to close.
5. Click **Close**.

About Project Issue Locations

Before using e-Builder to create and manage project issues, the project manager defines the list of locations and the documents associated with each. This enables the user to select a location and have it auto-fill any newly created issues. The list of locations will be editable through the life of the project so that new locations can be added as they become viable selections and old locations can be removed as they become deprecated.

The following is a list of tasks for working with project issue locations:

- Define Project Issue Locations
- Edit Project Issue Locations
- Delete Project Issue Locations
- Import Project Issue Locations
- Export Project Issue Locations
- Attach Documents to Project Issue Locations

Access the Manage Project Issue Locations Page

The Manage Project Issues Location Page gives you access to functions that enable you to add, modify or delete project issue locations.

To access the Manage Project Issues Location page

1. From the Home page, click the **Please select a project...** drop-down arrow and select a project.
2. Click the **Project Issue Locations** link located on the left navigation bar.

Related Topics:

- About Project Issue Locations

Import Project Issue Locations

To save time, project issue locations can be imported using a Microsoft Excel® spreadsheet. During the import process you will have the opportunity to download a template to ensure locations are uploaded in the proper format. If there are existing locations that you would like to keep, add these to the spreadsheet as well. Existing locations that are NOT added to the spreadsheet will be deleted.

To import project issue locations

1. Go to the Manage Project Issue Locations page.
For more information, see Access the Manage Project Issue Locations Page.
2. Click the **Import Locations** link.
The Import Locations dialog displays.

Note: Click **Download Template** for a template of the appropriate format of the locations.

3. Click **Browse**.
4. Search for and select the spreadsheet.
5. Click **Next**.
6. If there are errors, they display in the **Import Exceptions** section and the Import button is disabled. Click **Previous** to go back and import a new spreadsheet.

—Or—

If there are no errors, click **Import**.

Define Project Issue Locations

Before using e-Builder to create and manage project issues, the project manager must define the list of locations and the documents associated with each. This enables the user to select a location and have it auto-fill any newly created issues.

Note: Issue locations can also be imported. See Import Project Issue Locations for more information.

To define project issue locations

1. Go to the Manage Project Issue Locations page.
For more information, see Access the Manage Project Issue Locations page.
2. Click **Add Locations**.
The Add Locations dialog box displays.
3. Complete the required fields.
4. Click **Save**.

Related Topics:

- About Project Issue Locations

Edit Project Issue Locations

The project manager can modify project issue locations by changing location names or the item's nested location, but you cannot reorder items.

The following procedures are located below:

Change Location Name

Modify Nested Location

Change Location Name

To change the name of a location

1. Go to the Manage Project Issue Locations Page.
For more information, see Access the Manage Project Issue Locations Page.
2. Select the location you want to modify.
3. Click the **Edit Location** link.
The Quick Add Location dialog box displays.

4. Make all necessary changes.
5. Click **Save**.

Modify Nested Location

Project issue locations are saved in the way they display in the mobile application. You have the ability arrange locations such that the appropriate locations are nested where they need to be or display in the order that you choose.

To change an item's nested location

1. Go to the Manage Project Issue Locations page.
For more information, see [Access the Manage Project Issue Locations Page](#).
2. Select a location to move.
3. Click the **Edit Location** link.
The Quick Add Location dialog box displays.
4. Click the **Lookup** link to select where you would like to nest the selected location.
The Lookup Locations dialog box displays.
5. Select the location you'd like to nest the selected item.
6. Click **Save**.

Related Topics:

- [Delete Project Issue Locations](#)

Delete Project Issue Locations

If locations have been added in error or have become obsolete, they may have to be deleted by the project manager.

To delete project issue locations

1. Go to the Manage Project Issue Locations Page.
For more information, see [Access the Manage Project Issue Locations Page](#).
2. Select the location you want to modify.
3. Click the **Remove Location** link.

Related Topics:

- [Edit Project Issue Locations](#)

Export Project Issue Locations

If needed, project issue locations can be exported to an Excel™ spreadsheet. This can be used as another way to modify locations, by rearranging, adding or deleting locations and then importing the spreadsheet back into e-Builder.

To export project issue locations

1. Go to the Manage Project Issue Locations page.
For more information, see [Access the Manage Project Issue Locations Page](#).
2. Click the **Export Locations** link.

Attach Documents to Project Issue Locations

Documents such as site plans, schematics, and other drawings might be pertinent to the inspector while combing construction sites. Attaching these documents to issue locations makes them readily available for inspector and helps facilitate a smoother inspection process.

Tip

In IE 10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise.

To attach documents to project issue locations

1. Go to the Manage Project Issue Locations page.
For more information, see [Access the Manage Project Issue Locations Page](#).
2. Select the location you'd like to attach documents to.
3. Scroll beneath the fold and click **Attach Documents**.
The Attach Documents dialog box displays.
4. In the **Select Attachment Method** section, select your method of attachment.
5. Click **Browse For Files...**
6. Search for and select the file you want to attach.
You are returned to the Attach Documents dialog box.
7. If you are attaching files from e-Builder, go to step 8.
—Or—
If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.
8. Search for and select the e-Builder destination folder.
9. Click **Attach Selected**.

About Recurring Project Issues

Recurring issues are used as a template and can be reused throughout the life of a project and across different projects. By creating recurring issues, the project manager saves the inspector time when logging issues that are regularly found during walkthroughs. Recurring project issues can also be created on the fly by the inspector or contractor as issues are being added. Each recurring issue must have a unique subject within its specific form type in order to be saved, otherwise an error will occur.

Below is a list of tasks related to working with recurring project issues:

- [Access Recurring Project Issues Page](#)
- [Add Recurring Issues](#)

- Copy Recurring Issues to Different Projects
- Edit Recurring Issues
- Delete Recurring Issues

Access Recurring Project Issues Page

From the Recurring Project Issues page you are able to copy recurring issues to other projects, add, modify, and delete recurring issues.

To access the Recurring Project Issues page

1. From the Home page, click the **Please select a project** drop-down arrow and select a project.
2. Click the **Recurring Project Issues** link located on the Side Navigation Bar.

Related Topic:

- About Recurring Project Issues

Add Recurring Project Issues

To add a recurring project issue

1. Go to the Recurring Project Issues page.
For more information, see Access Recurring Project Issues Page.
2. Click **Add Issue**.
A list of project issues display.
3. Select an issue from the list.
The Fill Out Form dialog box displays.
4. Enter all required fields.
5. Click **Save Recurring Issue**.

If you entered a due date, the Confirm Due Date Offset page is displayed.

Note: The due date offset refers to the number of days from the present day that the item is due. This number is automatically populated in this field. In addition, if a workflow due date offset is configured for the project, this number of days is automatically added to the current due date. For more information on the workflow due date offset setting in the Project Settings, see Workflow Settings.

6. To change the due date, enter the number of days from the present in this field. To leave it the same, go to the next step.
7. Click **Save**.

Related Topics:

- About Recurring Project Issues

Copy Recurring Issue to Different Projects

To reduce data entry efforts, recurring issues can be copied across projects.

To copy a recurring issue to a different project

1. Go to the Recurring Project Issues page.
For more information, see [Access Recurring Project Issues Page](#).
2. Select the check box next to the issue(s) you want to copy.
3. Click **Copy To**.
The Select a Project submenu displays.
4. Click the drop-down arrow to select the project to copy the recurring issue to.
5. Click **Copy**.

Edit Recurring Issues

To edit a recurring issue

1. Go to the Recurring Project Issues page.
For more information, see [Access Recurring Project Issues Page](#).
2. Click the title of the issue you want to edit.
The Fill Out Form dialog box displays.
3. Make all necessary changes.
4. Click **Save Recurring Issue**.

Delete Recurring Issues

To delete a recurring issue

1. Go to the Recurring Project Issues page.
For more information, see [Access Recurring Project Issues Page](#).
2. Select the check box next to the issue(s) you want to delete.
3. Click **Delete**.

Project Issues Page Overview

The Project Issues page gives you access to all non-recurring project issues. This page is integral for working with project issues. You are able to take a number of actions from this page, including the following:

- Add project issues
- Send project issues
- Forward project issues
- Delete project issues
- Save issues as recurring

Fields and Buttons

The fields and buttons located on the Project Issues page are:

- **Project Issues for:** Displays the name of the project you are viewing project issues for. Click this drop-down arrow to select a different project to view project issues for.

Filter Project Issues

The Project Issues filter allows you to quickly filter for specific project issues based on certain criteria.

- **Hide Filter Options:** Click to hide the filter and increase the view of the project issues table.
- **Clear:** Click to clear all filter options.
- **Filter:** Click to filter by selected options.
- **All:** Select to filter by all issue types.
- **In My Court:** Select to filter by issues in your court only.
- **My Draft Issues:** Select to filter by your draft issues only.
- **Event Name:** Enter an event name to filter by.
- **Subject:** Enter a subject name to filter by.
- **Held By:** Click to filter by a specific user who has the issue in their court.
- **Priority:** Click an issue priority to filter by.
- **Open:** Select to filter by open project issues.
- **Closed:** Select to filter by closed project issues.
- **Overdue:** Select to filter by overdue project issues.
- **Issue Location:** Click to filter by a specific location.
- **Issue Type:** Click to filter by a specific issue type.
- **Due Date Range:** Enter a due date range to filter by due date, or click the calendar icon to select dates on the calendar.
- **Containing Text:** Enter some text that is also available in the project issue you are searching for. Click the drop-down arrow to select what part of the form to search for the containing text. Select from the following options:
 - Anywhere in the form
 - In the subject only
 - In the prefix only

Project Issues

The Project Issues table contains filtered results. Use the page navigation options to adjust the amount of data that appears on the page.

- **Page:** Click to jump to a different page of results.
- **Show:** Click to select a range of results to view per page.
- **Add Issue:** Click to add an issue. The Fill Out Form dialog box displays for you to select a form type to complete.
- **Send:** Click to send selected issues.

Note: Only draft issues can be sent and the only way to send these issues is by filtering for My Draft Issues by selecting this radio button located in the filter. If draft issues display as a result of any type of other search, the Send button will not display, but you can still send it by opening the issue and then clicking Post Form, see Send Project Issues for detailed steps.

- **Forward:** Click to forward selected issues.

Note:

Not all project issues can be forwarded. Issues that are able to be forwarded adhere to one or more of the following criteria:

- The issue is in your court
- The issue is closed
- Forwarding is not restricted for the particular issue type

- **Close:** Click to close selected issues.

Note: Not all project issues can be closed. Issues that are able to be closed adhere to the following criteria:

- The issue is in your court
- Closing is not restricted for the particular issue type

- **Delete:** Click to delete selected issues. Only draft issues can be deleted.
- **Subject:** Displays the subject of the project issue.
- **Issue Type:** Displays the issue type as determined by the account administrator.
- **Issue Category:** Displays the issue type as determined by the account administrator.
- **Location:** Displays the issue location as determined by the account administrator.
- **Help By:** Displays the name of the person whose court the issue is in currently.
- **Due Date:** Displays the date the issue is due to be resolved.
- **Event Name:** Displays the name of the event.

Manage Project Issue Locations Page

The Manage Project Issue Locations page is used by the project manager to define the list of locations and associated documents that will be used on construction sites. Locations can be added singly or en masse. Add locations in the order you want them to appear on the mobile application, or rearrange the locations manually. The following actions can be taken from this page:

- Add Project Issue Locations
- Edit Project Issue Locations
- Import Project Issue Locations
- Export Project Issue Locations
- Attach Documents to Project Issue Locations
- Delete Project Issue Locations

Fields and Buttons

The fields and buttons on this page are:

- **Cancel:** Click to cancel any unsaved changes and be redirected to the Project Details page.
- **Defined Locations:** Lists all existing locations.

- **Add Locations:** Click to add project issue locations. The Add Locations dialog box displays. Enter one location per line. From here you're able to change the order of the locations by clicking the **Lookup** link and nesting one location under the other.
- **Remove Selected Location:** Click to delete selected location.
- **Import Locations:** Click to import locations using an Excel spreadsheet. The Import Locations dialog box displays.
- **Export Locations:** Click to export the list of project locations to an Excel spreadsheet.
- **View:** Click to view the attached file.
- **Download:** Click to download the attached file.
- **Redline:** Click to add markups to the document. The number in parentheses represents the amount of times that the document has been marked up.
- **File Name:** Displays the name of the attached file.
- **Attached By:** Displays the name of the person that attached the file to the selected location.
- **Date Attached:** Displays the date the file was attached to the selected location.

Recurring Project Issues Page

The Recurring Project Issues page is used by the project manager to create the recurring issues that will be used throughout the life of the project. Recurring project issues can also be created by saving an existing issue as recurring. From this page you are able to take the following actions:

- Add Recurring Issues
- Copy Recurring Issue to Different Projects
- Edit Recurring Issues
- Delete Recurring Issues

Fields and Buttons

The fields and buttons located on this page are:

- **Project Issues for:** Displays the name of the project you are viewing project issues for. Click this drop-down arrow to select a different project to view project issues for.

Filter Recurring Project Issues

The Recurring Project Issues filter allows you to quickly filter for specific recurring issues based on certain criteria.

- **Hide Filter Options:** Click to hide filter and increase the view of the project issues table.
- **Clear:** Click to clear filter options.
- **Filter:** Click to filter by selected criteria.
- **Issue Type:** Click to filter by specific issue type.
- **Subject:** Enter the subject of the issue to filter by.
- **Containing Text:** Enter some text that is also available in the project issue you are searching for. Click the adjacent drop-down arrow to select what part of the form to search for the containing text. Select from the following options:

- Anywhere in the form
- In the subject only
- In the prefix only
- **Held By:** Click to filter by a specific user who has the issue in their court.
- **Priority:** Click an issue priority to filter by.
- **Due Date Offset:** Enter the number of days from the present day that the recurring project issue should be due.

Project Issues

The Project Issues table contains filtered results. Use the page navigation options to adjust the amount of data appears on the page.

- **Page:** Click to jump to a different page of results.
- **Show:** Click to select a range of results to view per page.
- **Add Issue:** Click to add an issue. The Fill Out Form dialog box displays for you to select a form type to complete.
- **Copy To:** Click to copy selected recurring issues to a different project.
- **Delete:** Click to delete selected recurring issues.
- **Subject:** Displays the subject of the project issue.
- **Issue Type:** Displays the issue type as determined by the account administrator.
- **Issue Category:** Displays the issue type as determined by the account administrator.
- **Help By:** Displays the name of the person whose court the issue is in currently.
- **Due Date Offset:** Displays the number of days from the present day that the recurring issue is due.
- **Priority:** Displays the priority of the recurring issue.

Reports

The e-Builder Reports module allows you to view reports on all aspects of your projects in e-Builder. Reports are lists, summaries, and analysis of your data, which you can display, print, export or save. It enables any e-Builder user to report on any of the e-Builder modules that they have access to. Matrix reports can be configured to include a broad range of metrics, such as: cash flow analysis, project status information, schedule variance, and more.

Typical Job Functions Using the Reports Module

e-Builder supports the different team members that are involved in the project. All users will be able to report on the Projects that they have access to. The information that is displayed in the report is limited based on the users permissions in each of the other modules in e-Builder.

All team members can take advantage of the reports module.

Executive

As an executive, you will use the e-Builder reports module to stay on top of the progress associated with all of your projects or your program. You will easily monitor your status on multiple projects. You will also review historical statistics and past project performance to determine what you should do on future

projects. You can also standardize the information you will measure, such as key performance indicators and/or milestones, to ensure you are looking at critical information in a consistent manner across your program. No need to log in to e-Builder either; using the report subscription function you will receive program-level reports directly in your email inbox at certain predefined times.

Project Manager

As the project manager, you will use the e-Builder reports module to summarize or aggregate your critical project information to quickly address issues before they become timely or costly. That means you will have complete control and access to the critical project information from start to finish.

You will manage by exception so you can instantly see when something slips. You can also drill into the detail as needed right from the report. You will use the reporting engine to analyze project performance. You will also be able to quickly identify and prevent bottlenecks, summarize projections and use this information to make informed decisions.

If you have many team members executing your plan you will access your resource reports that will help you gain an understanding on the tasks you are managing that are not complete, tasks that are slipping, or even tasks that are starting soon. Or, for example, during construction, you might want to generate an RFI, meeting minutes, or submittal log report to see which items are open, what are the latest comments, and who's court they are in.

The bottom line is that you will spend less time mining or managing the data. The e-Builder reports module will do that for you. You can then spend time where it's needed - managing the project to ensure it completes on time and within scope and budget.

Project Participant

As a team member, you will use the e-Builder reports module to quickly gain access to your work reports. You will need to know which tasks are starting soon, which are in progress, which are running late, and so forth. You may need to access a meeting minutes report that detail out the items that you are responsible to complete. Maybe you need to reconcile the invoice or commitment data you entered in the cost module within a project. Or, need to access a few key documents from a set of folders you are responsible to manage.

No matter the work responsibility, the reports module can allow you to easily create and manage reports that are important specifically for you so that at the end of the day you are spending less time trying to find project information and more time on getting the work done.

Using Report Folders

Report folders are used to organize and display saved reports.

To add a new report folder

Note: Only e-Builder Administrators will be able to add report folders.

1. Open the Reports page.
2. Click the **Add New Folder** link. The Add Report Folder page displays.
3. In the **Folder Name** field, enter the name of the new report folder.

4. Move any saved reports from the **Unfiled Reports** folder into the new folder by selecting the report names and using the arrow buttons (optional) to move the report.
5. Click **Save**. The new report folder is added.

To edit report folders

Note: Only e-Builder Administrators will be able to edit report folders.

1. Open the Reports page.
2. To edit a report folder or its contents, select its name from the **Folder** drop down list.
3. Click the **Edit** hyperlink beside the Folder field. The Edit Report Folder page displays.
4. You can perform the following actions in this page:
 - Edit the name of the folder in the Folder Name field.
 - Add or remove reports from the folder using the arrow buttons.
 - Delete the folder by clicking **Delete**.
5. When finished, click **Save** to retain the changes.

To delete a report folder

1. Open the Reports page.
2. To delete a report folder or its contents, select its name from the **Folder** drop down list.
3. Click the **Edit** hyperlink beside the Folder field. The Edit Report Folder page displays.
4. Click **Delete**. You will be asked to confirm your selection.
5. Click **Yes, Delete the Report Folder** to proceed.

Note: Any Reports saved in a deleted folder will automatically be moved into the Unfiled Reports folder.

To change the order of the report folders

Note: Only an e-Builder Administrator will be able to reorder the report folders.

1. Open the Reports page.
2. To change the order of the report folders, click **Reorder Folders**.
3. In the Reorder Report Folders page, click the name of a report folder and click the top, up, down, or bottom button to change the order they are listed in. The top button moves the folder to the top of the list, while the bottom button makes it the last report in the list, and the up or down buttons move the folder up or down one place from its current order.
4. When finished, click the **Save** button to save your changes.
—Or—
To cancel the process click the **Cancel** button.

To access the Reports page

1. On the top navigation tabs, click the **Reports** tab. The Reports page displays a list of report folders containing reports.

Note: Not all users may see the same reports in each folder. e-Builder administrators can assign reports to specific user groups.

2. To view the contents of a single folder, select the name of the folder from the **Folder** drop down list.

Tip: By default, the drop down list will display all report folders. You can also access other report folders by scrolling down the page.

From the Reports page, you can:

- o

Use the Report Wizard

From the Report Wizard, you can perform the following actions:

Add New Reports

The Add Report button on the Reports page opens up the Report Wizard. For more details on this function, see Adding Reports.

Email Reports

After running a report, you can send the report results by email. For more details on this function, see Email Reports.

Export Reports

The Export button on the Report Wizard page executes the same action as the Export link listed next to the name of any saved report. For more details on this function, see Exporting Reports.

Delete Reports

Individual users can delete their personal reports but only e-Builder User Guide Administrators can delete account level reports. For more details on this function, see Delete Reports.

Print View Reports

The Print View button performs a similar function to the Export button in that it also sends the results of your report into MS Excel. The print view is a snapshot of the page that maintains any groupings and totals that are on your report.

Save Reports

The Save As button allows you to save a report in e-Builder. When you have fully configured your report to present the data that is required in the correct format, you can save the report for future use.

Note: Only e-Builder Administrators (or those users that have permissions granted by the administrators) are able to save reports for other users. All other users will only be able to save reports in their personal reports folder. Administrators can refer to Manage Permissions to learn how to give non-administrator users the permission to save reports for others.

Add New Reports

All e-Builder users can create their own custom reports using the Report Wizard.

To add a new report

1. Open the Reports page.
2. Click **Add Report**. The Report Wizard page is displayed and guide you through the following sequence of steps.

Note: These page overviews are comprehensive of what is available, however you can skip customizable steps 2- 7 to execute the report quicker with the standard report defaults, as step 1 is the only required step.

- i. Select the type of data for the report
- ii. Select the report type
- iii. Select columns
- iv. Select aggregate functions
- v. Configure columns
- vi. Select grouping
- vii. Specify filter criteria

To jump to a particular step in the Report Wizard

At any time in the process of creating a report, you have the option to skip or jump to an upcoming or previous step in the Report Wizard. To do this, select the name of the step from the **Jump to step** drop down list.

Select the Type of Data

The first step of the Report Wizard allows you to select the type of data to report on.

Note: e-Builder reporting is permission based, so the list of reports available for an individual to select from are driven by the roles and permissions set by the administrator.

e-Builder Administrators will also be able to set a report to display the results that a specific user has permission to see.

Tip

An e-Builder Administrator can utilize the Run As User option to generate a report on all projects without adding users to additional projects. The Administrator could run the report as if run by him/ her. This would be useful for executives who require program-level reporting and do not have access to every project in e-Builder.

Types of Data for Reports

The types of data for reports available are:

Administrative Reports

The Administrative Reports option enables the e-Builder administrator(s) to report on user and project information to help manage their account.

The types of administrative reports that can be run are as follows:

- **Role Membership:** Report on the account roles for the users on the account. For example, report on the users in the architect role to verify that all new architects have been added to it.
- **Project Membership:** Report on which projects each user has been added to. For example, report on the membership of a new project to verify that all appropriate users have been added to it.
- **User Details:** Report on any of the user information fields. For example, a list of users located in a specified city or state or number of times they have logged in.
- **Project Activity:** Report on high level project usage information. For example, report on how many files have been saved on all projects to verify that users are storing their information in the e-Builder documents module.
- **Audit Log:** Report on activity that has transpired within the Administrative Tools. For example, report on when an administrator added a new user to the account.
- **Form Type Permissions:** Report on the form type permissions of each account role. For example, report on the account roles that have permission to fill out an action item.

Bidding Reports

The Bidding Reports option enables you to report on data in the Bidding module of e-Builder.

Note: If your account is not using set up to use the Bidding module, you will not see it listed as an option.

The types of bidding reports that can be run are as follows:

- **Project Bidding Summary:** A high-level overview of the status of the bids on your projects. For example, you could print a summary report showing the numbers of invited bidders, their respective statuses, and responses for each of your projects.
- **Bidders:** Report on the companies or contacts that have either submitted or just been invited to bid. For example, you could run a report of all companies, their contact information, a summary column showing the details of their bidding, and other pertinent information.
- **Bid Coverage:** Report on your bid coverage for a project, listed by construction code. For example, you could run a report that shows how many bidders were invited and how many accepted the invitation to bid for MEP work. If you configured color coding for each of your columns in the invited bidder details for the project bid, it will also carry forward and be shown in the report output.

Contact Reports

The Contact Reports option enables you to report on data in the Contacts module of e-Builder.

The types of contact reports that can be run are as follows:

- **Companies:** Report on the companies listed in your contacts database. For example, a list of your vendors that qualify as diversity suppliers.
- **Contacts:** Report on the contacts stored in your contacts database. For example, a list of all of your primary contacts with each of your vendors.

Cost Reports

The Cost Reports option enables you to report on data in the Cost module of e-Builder. The cost module allows the widest variety of report types.

The types of cost reports that can be run are as follows:

- **Project Cost Summary:** Report on Budget Cost Summary data for one or more projects. For example, a report showing the Total Budget, Commitments, and Actual Costs on each project in a capital program.
- **Budget Line Item:** Report on Cost information for each line item in the budget. For example, report on how much money is left to spend on Construction on all 5 of your active projects.
- **Budget Changes:** Report on the changes to a budget. For example, a Project Manager can see a list of all of their budget changes and the reason why each change was made.
- **Budget Change Items:** Report on budget changes for each line item in the budget. For example, a list of the budget changes for each line item in the budget on all new construction projects.
- **Budget Planning Summary:** Report on budgets while they are in the draft status. For example, a list of projects with budgets in draft status that have been submitted for approval
- **Budget Planning By Line Item:** Report on budgets at the line item detail level while they are in the draft status. For example, a Project Manager can report on how much he has budgeted for design fees on each of his projects before he approves the budgets.
- **Commitments:** Report on commitments for one or more projects. For example, prior to negotiating a new contract with a vendor, run a report on how much is committed with that vendor on all projects.
- **Commitment Items:** Report on the details of commitment items. For example, report on the breakdown by budget line item of all contracts with the General Contractor or Architect on a project.
- **Commitment Changes:** Report on any changes to commitments. For example, a Project Manager can report on all pending commitment changes to see what the impact would be if each of the associated change orders were approved.
- **Commitment Change Items:** Report on the changes to commitments at the commitment item level. For example, a detailed list of the impact on each commitment item of the change orders on a project.
- **Actual Costs:** Report on the invoices for one or more projects. For example, a report of the invoices approved by month during the course of a project.
- **Actual Cost Items:** Report on the details invoice items. For example, a report showing the contracts on a project and the detailed breakdown of how much has been paid on each one.
- **Items Pending Approval:** Report on the draft items that are awaiting approval. For example, a list of all of the commitments that need to be approved by the Project Manager.
- **Funding Sources:** Report on the status of the funding sources for one or more projects. For example, show how much has been used from each funding source and what the remaining balance is.
- **Funding Source Transactions:** Report on the individual transactions involving the funding sources. For example, a report showing all of the transactions on the funding source.

- **Budget Funding:** Report on the funding source allocations assigned to each budget line item. For example, a matrix report showing all the funding sources and their budget line item allocation amounts, grouped by account code and description.
- **Commitment Funding:** Report on the funding source allocations assigned to each commitment line item. For example, a matrix report showing all the funding sources and their commitment line item allocation amounts, grouped by account code and description.
- **Actual Cost Funding:** Report on the funding source allocations assigned to each invoice line item. For example, a matrix report showing all the funding sources and their invoice line item allocation amounts, grouped by account code and description.
- **Cash Flow:** Report on the expected cash outflows in previous or future months for one or more projects. For example, a Program Manager can report on the expected cash flow in the coming 12 months in order to plan when to borrow the necessary funds.
- **Cash Flow Details:** Report at the budget line item level on expected cash outflows. For example, a report that shows how much money is expected to be spent in 6 months on both design and construction.

Tip

There is overlap in the reporting options on many of the report types. Because of this you may be able to use more than one type of cost report to provide you with the data that you need.

- In the e-Builder database, all the currency values are stored up to four decimal places but only two are viewable on the Cost View, which may lead to rounding differences. This means that if you filter on an exact decimal amount looking at data via the Cost View, you may not get the correct results.

Calendar Reports

The Calendar Reports option enables you to report on meetings and events recorded in the Calendar module of e-Builder.

The types of calendar reports that can be run are as follows:

- **Events:** Report on calendar events that you have access to view in e-Builder. For example, a list of meetings that you created on a specific project.
- **Attendees:** Report on who attended calendar events. For example, report on the number of times each member of your team attended the weekly status meeting.

Combined Reports

The Combined Reports option enables you to report on data in both the Schedule and Cost modules of e-Builder in the same report.

Note: If your account is not using both the Cost & Schedule modules, then you will not see it listed as an option.

The columns available for selection in the subsequent steps will include both Schedule and Cost fields.

The types of combined reports that can be run are as follows:

- **Project Cost and Schedule:** Report on the high level Cost and/ or Schedule information on some or all of your projects. For example, a program wide executive status report that shows the starting dates and budgets for each project.

Document Reports

The Document Reports option enables you to report on data in the Documents module of e-Builder.

The types of document reports that can be run are as follows:

- **Document Usage:** Report on the number of files and folders being used on a project (or for multiple projects) and the amount data being stored. The number of files includes the number of versions for a file. For example, if you are using File A and File B but you recently uploaded a new version for File B, the total number of files will be 3. Project Managers might run this report to review how many documents have been stored for a given project.
- **Document Log:** Report on the number of individual files (excludes versions of the same file) that are uploaded into the documents area of any project. For example, a list of all files added to the Schematic Design folder during the week that they were due for submission.
- **Progress Photo:** Report on progress photos and display thumbnail images of the photos. For example, a report showing Aerials uploaded in the past 2 weeks.
- **Progress Photo Image:** Display images of the photos stored in a progress photos folder. This report would be used to see larger sized images of a specified set of progress photos. For example, to complete a close out package for a project the Project Manager may want to run a full Progress Photo report of all documented images from start to finish.

Forms/ Workflow Reports

The Forms/ Workflow Reports option enables you to report on data in the Forms module of e-Builder.

Note: If your account is not using the Forms module, then you will not see it listed as an option.

The types of form reports that can be run are as follows:

- **Forms Summary:** Report on all form types filled out on one or many projects. For example, a summary of all outstanding Change Orders and Action Items on projects in the Southeast region.
- **Form Log:** Report on the custom fields created for a specific form type. For example, create an RFI log which shows the information requested field and the response for all RFIs on a project.

Process Reports

The Process Reports option enables you to report on data in the Process module of e-Builder.

Note: If your account is not using the Process module, then you will not see it listed as an option.

The types of process reports that can be run are as follows:

- **Process Summary:** Report on all process types filled out on one or many projects. For example, a list of all outstanding Change Orders and Action Items on projects in the Southeast region.
- **Process Log:** Report on the custom data fields created for a specific form type. For example, create an RFI log which shows the information requested field and the response for all RFIs on a project.

Schedule Reports

The Schedule Reports option enables you to report on data in the Schedule module of e-Builder.

The types of Schedule reports that can be run are as follows:

- **Schedules and Tasks:** Report on overall schedule and on individual tasks that compose the schedule for one or more projects. For example, a report showing all tasks on a project that are scheduled to finish 5 days or more behind schedule. This type of report can generate a Gantt Chart.
- **Schedules:** Report on overall schedule and master tasks in the schedule for one or more projects. For example, a report listing the start and finish date and each of the key master tasks included in the schedule for one or more projects.

Note: Master tasks are critical dates or milestones that are common across more than one project. To enable true program level reporting that meets the needs of an executive, e-Builder requires tasks to be flagged program-wide. The Administration Tools section will cover how to configure master tasks in e-Builder.

Time Tracking Reports

The Time Tracking Reports option enables you to report on data in the Time Tracking module of e-Builder.

The following Time Tracking report can be run:

- **Time Sheet Details:** Report on the time sheet details like the creation date, entry dates, hours and activity codes.

To select the type of data for the report

1. Open **Reports**.
2. Click **Add Report**. The Report Wizard displays.
3. From the drop-down list, select the type of report. A list of report type subsections are displayed below the drop-down list. The options vary based on the modules in use on your account.
4. Click on a report type subsection to select it. A preview of the report and a description are displayed on the right.
5. To set up the report to run as a particular user:
 - i. Click **Lookup** in the Run As User field. The Lookup window displays.
 - ii. Search for a particular user by entering or selecting values in one or more of the following filters:
 - First Name
 - Last Name
 - Username
 - Company
 - User custom field
 - Contact custom field
 - iii. Click **Filter**. The usernames matching the filter criteria are displayed.
 - iv. Select the check box beside the username you wish to choose and click **Insert Selected** to add the name to the Run As User field.

Note: Populate the **Run As User** field to run the report in that user's context. Leave this field blank to run the report in logged in user's context.

6. Click **Next** to proceed to Step 2 in the Report Wizard.

Select the Type of Report

In Step 2 of the Report Wizard, you can select the type of report to use.

The following types of reports are available:

Tabular reports

Tabular reports provide a simple listing of data, with no subtotals. Reports for a single project with one set of data can be run as tabular reports.

Tip: Use this type for reports such as document logs, and contact lists.

Summary reports

Summary reports provide the option to sort and subtotal the data. This is the most commonly used report type.

Reports for multiple projects with different attributes can be run as summary reports.

Matrix reports

Matrix reports summarize data in a grid by grouping data in both rows and columns. This report type is most commonly used for reports rich in numerical data.

Note: Always use this report type when running a Cash Flow or Cash Flow Details report.

Use this type of report to sort by two dimensions on a report. For example, a report can be grouped by both project name and year.

To select the type of report

1. In Step 2 of the Report Wizard, select the radio button beside the type of report you wish to use.
2. Click **Next** to proceed to the next step of the Report Wizard. See Report Wizard for more details.

—Or—

Click **Run Report** to run your report with no additional configuration, thus skipping the rest of the steps in the Report Wizard.

Select Columns

In Step 3 of the Report Wizard, you can select the columns to be included in your report. You can select the data you wish to include in your report. Each piece of data will be a column in your report. This page will include all the possible reportable data types associated with the type of report you are running, including, but not limited to project information, custom fields and more.

Different sections containing data fields, which pertain to the report data you selected in Step 1, will be available for selection in this step.

Example

For a Process Summary report, you will see sections containing data related to Project Information, Project Custom fields, Process Information, Process Custom fields).

Use the Multivalued Field option

e-Builder also allows you to split the rows on the report when there is more than one value, for any multiple pick list custom field, multiple check box form field, or multiple pick list process data field. The report will display the results on separate lines instead of displaying them on one line.

Example

When the **Return row for each multivalued field value** check box is selected, if the result for a multivalued field is regions Eastern, Northern, and Southern, they will be displayed in the report this way:

Regions
Eastern Division
Northern Division
Southern Division

Instead of this way:

Regions
Eastern Division, Northern Division, Southern Division

Use the Formula Builder

In addition to the fields listed on the Select Columns page you can add your own formula columns. A formula column will allow you to perform mathematical functions on the data in one or more columns.

The Formula Builder gives you a way to have report columns automatically populate with data. Both standard and unique data can be included by creating a formula using existing project information stored in e-Builder.

Formulas can range in complexity. The most straightforward formulas might include functions that automatically insert the current date and time into a report column. More complex formulas might include mathematical operations that provide the average square footage of X-ray rooms or school gyms. Another example might be the sum of the current contract values on all commitment and commitment changes.

Setting up these data fields is optional, but they can reduce the time it takes you to fill-out data fields and make information readily available without having to search through the system for it.

Note: Alphanumeric fields such as an address and strictly alphabetical fields such as the project names, cannot be combined with mathematical operators (+-/*) to build a formula, otherwise an error will occur. When using mathematical operators, only numeric fields can be used.

Tip: Use a formula column with a Cost column divided by a budget custom field for Square Feet to calculate the cost per square foot on a project.

Functions

Functions are predefined expressions that allow you to input data to complete assignment expressions. The following options are available:

Field	Description
Now()	Returns current date and time in GMT: <ol style="list-style-type: none"> 1. Select this function. 2. Click Insert. 3. Select a field from the Assign to Field drop-down arrow. 4. Click Save.
Today()	Returns current date and time in your time zone (The run as user): <ol style="list-style-type: none"> 1. Select this function. 2. Click Insert. 3. Select a field from the Assign to Field drop-down arrow. 4. Click Save.
MinDate (value1, value2)	Minimum date (applies to date fields only): Returns the smaller of two specified date values. <i>Value1</i> is the first of the two numeric values to compare. <i>Value2</i> is the second of the two numeric values to compare.
MaxDate (value1, value2)	Maximum date (applies to date fields only): Returns the larger of two specified numeric values. <i>Value1</i> is the first of the two numeric values to compare. <i>Value2</i> is the second of the two numeric values to compare.
DateDiff (datepart, start, end)	Returns a value for the difference between a start and end date. <p>The <i>datepart</i>, <i>start</i> and <i>end</i> parameters should be enclosed with double quotes if you are not using data fields, as outlined in the steps below.</p> <p><i>Start</i> and <i>end</i> are expressions that should be resolved to a date, using any valid date formats, such yyyy-mm-dd, mm/dd/yyyy, etc.</p> <p>The table below lists all valid <i>datepart</i> arguments and the abbreviations that can be used to replace them.</p> <p>datepart</p>

Field	Description	
	datepart	Abbreviations
	year	yy, yyyy
	quarter	qq, q
	month	mm, m
	dayofyear	dy, y
	day	dd, d
	week	wk, ww
	hour	hh
	minute	mi, n
	second	ss, s

1. Select the **DateDiff(datepart, start, end)** function and click **Insert**.
The function displays as **DateDiff(, ,)**.
2. Place your cursor before the first comma.
3. Enter double quotes + [valid datepart or abbreviation] + double quotes.
So far, the formula should look similar to: **DateDiff("year", ,)**
4. Place your cursor before the second comma.
5. To enter a data field, click the **Select Field** drop-down arrow and make a selection.
—Or—
To enter a date, enter the [Date (value) function located in the Functions drop-down menu].
Note: For the (value) enter the end date value. For information on the [Date (value)] function, see Date(value) below.
6. Place your cursor after the second comma.
7. To enter a data field, click the **Select Field** drop-down arrow and make a selection.
—Or—
To enter a date, enter the [Date (value) function located in the Functions drop-down menu].
Note: For the (value) enter the end date value. For information on the [Date (value)] function, see Date(value) below.
8. Click **Done**.

Field	Description																				
DateAdd (datepart, number, date)	<p>Returns a date with the given amount added to it.</p> <p>The <i>datepart</i>, <i>number</i> and <i>date</i> parameters should be enclosed with double quotes if you are not using data fields, as outlined in the steps below.</p> <p><i>Number</i> is an expression that can be resolved to an integer that is added to a <i>datepart</i> of <i>date</i>. If you specify a value with a decimal fraction, the fraction is truncated and not rounded.</p> <p><i>Date</i> is an expression that should be resolved to a date, using any valid date formats, such as yyyy-mm-dd, mm/dd/yyyy, etc.</p> <p>The table below lists all valid <i>datepart</i> arguments and the abbreviations that can be used to replace them.</p> <p>datepart</p> <table border="1" data-bbox="383 787 1414 1444"> <thead> <tr> <th data-bbox="383 787 821 850">datepart</th> <th data-bbox="821 787 1414 850">Abbreviations</th> </tr> </thead> <tbody> <tr> <td data-bbox="383 850 821 913">year</td> <td data-bbox="821 850 1414 913">yy, yyyy</td> </tr> <tr> <td data-bbox="383 913 821 976">quarter</td> <td data-bbox="821 913 1414 976">qq, q</td> </tr> <tr> <td data-bbox="383 976 821 1039">month</td> <td data-bbox="821 976 1414 1039">mm, m</td> </tr> <tr> <td data-bbox="383 1039 821 1102">dayofyear</td> <td data-bbox="821 1039 1414 1102">dy, y</td> </tr> <tr> <td data-bbox="383 1102 821 1165">day</td> <td data-bbox="821 1102 1414 1165">dd, d</td> </tr> <tr> <td data-bbox="383 1165 821 1228">week</td> <td data-bbox="821 1165 1414 1228">wk, ww</td> </tr> <tr> <td data-bbox="383 1228 821 1291">hour</td> <td data-bbox="821 1228 1414 1291">hh</td> </tr> <tr> <td data-bbox="383 1291 821 1354">minute</td> <td data-bbox="821 1291 1414 1354">mi, n</td> </tr> <tr> <td data-bbox="383 1354 821 1444">second</td> <td data-bbox="821 1354 1414 1444">ss, s</td> </tr> </tbody> </table> <ol style="list-style-type: none"> 1. Select the DateAdd(datepart, number, end) function and click Insert. The function displays as DateAdd(, ,). 2. Place your cursor before the first comma. 3. Enter double quotes + [valid datepart or abbreviation] + double quotes. So far, the formula should look similar to: DateAdd(year , ,). 4. Place your cursor before the second comma. 1. To enter a data field, click the Select Field drop-down arrow and make a selection. <p>—Or—</p>	datepart	Abbreviations	year	yy, yyyy	quarter	qq, q	month	mm, m	dayofyear	dy, y	day	dd, d	week	wk, ww	hour	hh	minute	mi, n	second	ss, s
datepart	Abbreviations																				
year	yy, yyyy																				
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day	dd, d																				
week	wk, ww																				
hour	hh																				
minute	mi, n																				
second	ss, s																				

Field	Description												
	<p>Enter a numeric value.</p> <ol style="list-style-type: none"> Place your cursor after the second comma. To enter a data field, click the Select Field drop-down arrow and make a selection. <p>—Or—</p> <p>To enter a date, enter the [Date (value) function located in the Functions drop-down menu].</p> <p>Note: For the (value) enter the end date value. For information on the [Date (value)] function, see Date(value) below.</p> <ol style="list-style-type: none"> Click Done. 												
Date (value)	<p>Allows you to convert a date in string form to a date type. <i>Value</i> is the string value.</p> <p>Examples:</p> <table border="1"> <thead> <tr> <th>Formula</th> <th>Sample Output</th> </tr> </thead> <tbody> <tr> <td>Date("12.10.2013")</td> <td>12.10.2013</td> </tr> <tr> <td>Date("12-10-2013")</td> <td>12.10.2013</td> </tr> <tr> <td>Date("12/10/2013")</td> <td>12.10.2013</td> </tr> <tr> <td>IIFDate(1 > 2, Date("12.10.2013"), Date("12.12.2013"))</td> <td>12.10.2013</td> </tr> <tr> <td>MaxDate(Date("12.10.2013"), Date("12.12.2013"))</td> <td>12.10.2013</td> </tr> </tbody> </table>	Formula	Sample Output	Date("12.10.2013")	12.10.2013	Date("12-10-2013")	12.10.2013	Date("12/10/2013")	12.10.2013	IIFDate(1 > 2, Date("12.10.2013"), Date("12.12.2013"))	12.10.2013	MaxDate(Date("12.10.2013"), Date("12.12.2013"))	12.10.2013
Formula	Sample Output												
Date("12.10.2013")	12.10.2013												
Date("12-10-2013")	12.10.2013												
Date("12/10/2013")	12.10.2013												
IIFDate(1 > 2, Date("12.10.2013"), Date("12.12.2013"))	12.10.2013												
MaxDate(Date("12.10.2013"), Date("12.12.2013"))	12.10.2013												
IsNullDate(date)	Allows you to determine whether or not a value exists for this date field. If it does, then it will be factored into the formula.												
IsNullString(value)	Allows you to determine whether or not a value exists for this string field. If it does, then it will be factored into the formula.												
Remove-WhiteSpace (value)	Returns the given value with extra spaces removed. This function removes both leading and trailing spaces from the text as well as converting blocks of multiple spaces within the text into a single space character. (e.g. the text becomes the text'). Value is the text to remove extra spaces from.												
Trim (value)	Removes white space from the beginning and end of the given value. (Value) is the text to strip preceding and following white space from.												
Find (similar to VB Instr)	Finds a string within a string & returns the character number where the search string is found.												

Field	Description
Left (source value, length number)	Use to find a specified number of characters from the left (beginning) of a string.
Mid (source value, start position number, length number)	Returns the middle x characters of a string, starting at position y within the string.
Right (source value, length number)	Returns a specified number of characters from the right (end) of a string.
Substitute (source value, search value, substitution value)	Changes characters within a string.
Replace (source value, start position number, length):	Used to replace characters within a text.
Rev (source	Returns a reversed string. For example, REV(Luke) returns ekuL.

Field	Description
value)	
Len (source value)	Returns the length of the inputted variable
IIFString (Condi- tion, true string, false string)	<p>If and only if (applies to text fields only):</p> <p>Evaluates the given <i>condition</i> and returns the text for <i>true string</i> if the evaluation succeeds or the text for <i>false string</i> if the evaluation fails.</p> <p><i>Condition:</i> Boolean expression used to determine which text to return.</p> <p><i>True String:</i> If condition evaluates success then this text value is returned.</p> <p><i>False string:</i> If condition evaluates failure then this text value is returned.</p> <ol style="list-style-type: none"> Select this function. Click Insert. Place your cursor before the first comma, enter the condition by selecting a data field from the Select Field drop-down arrow, and then click Insert. Place your cursor before the second comma. To use a data field for the "if true value", make a selection from the Select Field drop-down menu and click Insert. <p>—Or—</p> <p>To enter your own value, enter double quotes + [true string value] + double quotes.</p> <ol style="list-style-type: none"> Place your cursor after the second comma. <p>To use a data field for the "if false value", make a selection from the Select Field drop-down menu and click Insert.</p> <p>—Or—</p> <p>To enter your own value, enter double quotes + [false string value] + double quotes.</p> <ol style="list-style-type: none"> Click Done.
IIFNum- ber (Condi- tion, true string, false string)	<p>If and only if (applies to number fields only):</p> <p>Evaluates the given <i>condition</i> and returns the number in <i>true number</i> if the evaluation succeeds or the number in <i>false number</i> if the evaluation fails.</p> <p><i>Condition:</i> Boolean expression used to determine which number to return.</p> <p><i>True String:</i> If condition evaluates success then this number value is returned.</p> <p><i>False string:</i> If condition evaluates failure then this number value is returned.</p> <ol style="list-style-type: none"> Select this function.

Field	Description
	<ol style="list-style-type: none"> 2. Click Insert. 3. Place your cursor before the first comma, enter the condition by selecting a data field from the Select Field drop-down arrow (e.g. Contract Sum), and then click Insert. 4. Place your cursor before the second comma. To use a data field for the "if true value", make a selection from the Select Field drop-down menu and click Insert. —Or— To enter your own value, enter double quotes + [true number value] + double quotes. 1. Place your cursor after the second comma. To use a data field for the "if false value", make a selection from the Select Field drop-down menu and click Insert. —Or— To enter your own value, enter double quotes + [false number value] + double quotes. 2. Click Done.
IIFDate (Condi- tion, true string, false string)	<p>If and only if (applies to date fields only):</p> <p>Evaluates the given <i>condition</i> and returns the date in <i>true date</i> if the evaluation succeeds or the date in <i>false date</i> if the evaluation fails.</p> <p><i>Condition</i>: Boolean expression used to determine which date to return.</p> <p><i>True String</i>: If <i>condition</i> evaluates success then this date value is returned.</p> <p><i>False string</i>: If <i>condition</i> evaluates failure then this date value is returned.</p> <ol style="list-style-type: none"> 1. Select this function. 2. Click Insert. 3. Place your cursor before the first comma, enter the condition by selecting a data field from the Select Field drop-down arrow (e.g. Contract Sum), and then click Insert. 4. Place your cursor before the second comma. To use a data field for the "if true value", make a selection from the Select Field drop-down menu and click Insert. —Or— To enter your own value, enter double quotes + [true string value] + double quotes. 5. Place your cursor after the second comma. To use a data field for the "if false value", make a selection from the Select Field drop-down menu and click Insert. —Or— To enter your own value, enter double quotes + [false string value] + double quotes.

Field	Description						
6.	Click Done .						
MinNumber (value1, value2)	Minimum number: Returns the smaller of two specified numeric values. <i>Value1</i> is the first of the two numeric values to compare. <i>Value2</i> is the second of the two numeric values to compare.						
MaxNumber (value1, value2)	Maximum number: Returns the larger of two specified numeric values. <i>Value1</i> is the first of the two numeric values to compare. <i>Value2</i> is the second of the two numeric values to compare.						
IsInList (list, value)	<p>Returns true if a value is contained in either (1) the selected values of a Multi Pick List Custom Field column, or (2) the values in a comma delimited string. IsInList() must be used as part of a condition in formulas like IIFString, IIFNumber, or IIFDate.</p> <p><i>List</i> is a Multi Pick List Custom Field column, or comma delimited string.</p> <p><i>Value</i> is the value to search for.</p> <p>Examples:</p> <table border="1" data-bbox="383 1016 1417 1325"> <thead> <tr> <th>Formula</th> <th>Sample Output</th> </tr> </thead> <tbody> <tr> <td>IIFString(IsInList({CustomProject.ProjectMPLCustomField}, 2), 2 was in the list, 2 was not in the list)</td> <td>2 was in the list</td> </tr> <tr> <td>IIFString(IsInList("one, two, three", "two"), "two is in the list", "two is not in the list")</td> <td>two is in the list</td> </tr> </tbody> </table>	Formula	Sample Output	IIFString(IsInList({CustomProject.ProjectMPLCustomField}, 2), 2 was in the list, 2 was not in the list)	2 was in the list	IIFString(IsInList("one, two, three", "two"), "two is in the list", "two is not in the list")	two is in the list
Formula	Sample Output						
IIFString(IsInList({CustomProject.ProjectMPLCustomField}, 2), 2 was in the list, 2 was not in the list)	2 was in the list						
IIFString(IsInList("one, two, three", "two"), "two is in the list", "two is not in the list")	two is in the list						
Str (value)	<p>Converts a value to a string. This function gives you the ability to output a string or empty value. <i>Value</i> is the value you want to convert to a string. conversion of date diff..works best for string or number</p> <table border="1" data-bbox="383 1488 1417 1724"> <thead> <tr> <th>Formula</th> <th>Sample Output</th> </tr> </thead> <tbody> <tr> <td>Str(1+2)</td> <td>3</td> </tr> <tr> <td>IIFString (1>2, "", Str(DateDiff("d", Today (), {Portals.CreateDate})))</td> <td>5</td> </tr> </tbody> </table>	Formula	Sample Output	Str(1+2)	3	IIFString (1>2, "", Str(DateDiff("d", Today (), {Portals.CreateDate})))	5
Formula	Sample Output						
Str(1+2)	3						
IIFString (1>2, "", Str(DateDiff("d", Today (), {Portals.CreateDate})))	5						
Done	Click to save the formula. If the expression is invalid, an error message displays for you to						

Field	Description
	make necessary corrections.
Cancel	Click to cancel the operation and close this window.

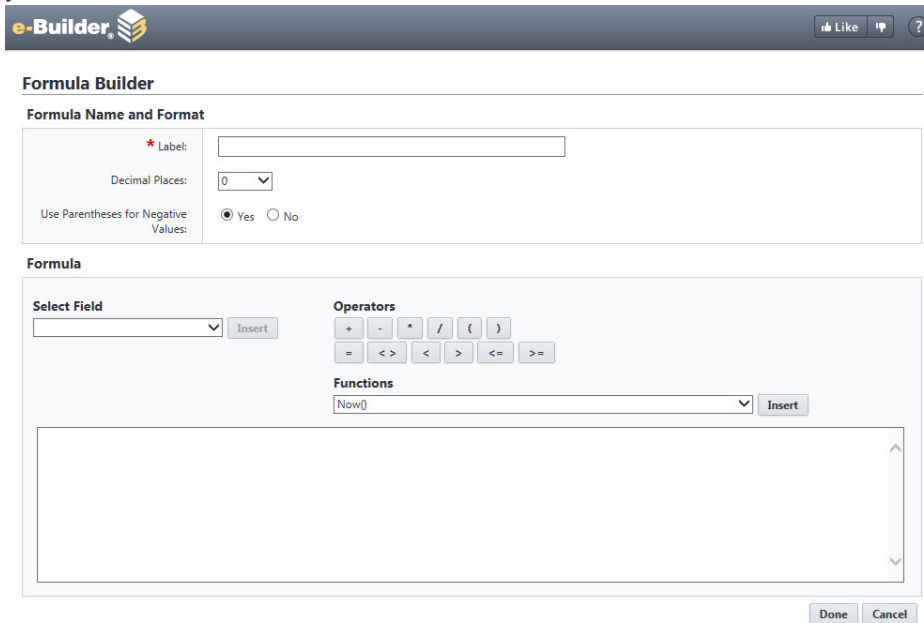
To select columns to include in your report

1. In step 3 of the Report Wizard, select the check boxes for the data you wish to include as columns in your report.

Note: The columns listed will vary based on the type of data selected in Step 1 of the Report Wizard.

Tip: Some of the columns will already be selected when you arrive at this step. To add or remove columns from the report, select or clear the check box next to the name of the column. To add or remove all of the columns in one section click the **Select All** or **Deselect All** link corresponding with the name of that section.

2. To add formula columns, click **Add New Formula Column**. The Formula Builder popup displays where you can define the formula name and format.



To add formula columns

- i. In the Formula Builder window, enter a name for the formula column in the **Label** field. This is a required field.
- ii. From the **Decimal Places** drop down list, select a preferred decimal placement for integer values.

- iii. In the **Use Parentheses for Negative Values** field, choose one of the following options:
 - **Yes:** Select this option to use parentheses around negative values. This is the default selection.
 - **No:** Select this option if you do not want negative values to be denoted by parentheses or distinguished at all.
- iv. Within the **Formula** section, choose a field name from the **Select Field** drop-down list then click **Insert**.

Note: The selections in this drop-down arrow will also vary depending on the fields configured. Moreover, if the workflow is for a cost-related process, it will contain many more fields, specific to cost.

- v. From the **Operators** section, click on the operator you wish to add.

Tip: Operators are used to build formulas between data fields. Alphanumeric fields such as an address and strictly alphabetical fields such as the project names, cannot be combined with mathematical operators (+-/*) to build a formula, otherwise an error will occur. When using mathematical operators, only numeric fields can be used.

- vi. From the **Functions** drop-down list, choose the mathematical function to use and click **Insert**. The selections are displayed in the formula preview section.
 - vii. Continue this process until the formula value is fully defined.
 - viii. Click **Done**. Any errors in the formula are displayed below the preview section, if present. If there are no errors, the formula column is added to the Report Wizard.
 - ix. Select the check box next to the newly added formula column label to add it as a column to the report.
3. Select the **Return row for each multivalued field** value check box to display the values of a data type which may have multiple values into separate columns.
 4. Click **Next** to proceed to Step 4 in the Report Wizard.

Select Aggregate Functions

In Step 4 of the Report Wizard you can select the aggregate functions to include in your report.

Columns

The Standard Summary Fields section will always display the Record Count row, along with the Sum check box to indicate that all columns will have a total count and it can only use the Sum aggregate function.

This section will also list out all the columns you selected to include in the report in step 3 of the Report Wizard. Each row will have check boxes within the column that is applicable for that item, and you can select all the aggregate functions you wish to have applied.

Example

If you wish to sum up a report column by Largest Value and Smallest Value then you would select both check boxes for that report column.

Aggregate Functions

The following aggregate functions are available:

- **Sum Summary:** The Sum aggregate function totals the values of the column that it is selected for. It will be available on every report type for the Record Count column. Using the sum field on the record count column will provide a total for the number of records returned on the report. When available, select this check box to have the report column in context totaled by summing up all the values of that column.

The sum option will also be available for other columns that have numeric values, such as Budget or Actual Cost columns.

- **Average Summary:** The Average aggregate function takes an average of the values of the column that it is selected for. It will also return the average of any columns that are grouped (see below).

The average option will be available for columns that have numeric values, such as Budget or Actual Cost columns. When available, select this check box to have the report column in context totaled by averaging all the values of that column.

- **Largest Value Summary:** The Largest Value aggregate function returns the largest value from the column that it is selected for. It will also return the largest value from any columns that are grouped. When available, select this check box to have the report column in context totaled via listing the largest value within that column.

The largest value option will be available for columns that have numeric values, such as Budget or Actual Cost columns.

The Largest Value result will be displayed as Max.

- **Smallest Value Summary:** The Smallest Value aggregate function returns the smallest value from the column that it is selected for. It will also return the smallest value from any columns that are grouped. When available, select this check box to have the report column in context totaled by listing the smallest value within that column.

The smallest value option will be available for columns that have numeric values, such as Budget or Actual Cost columns.

The Smallest Value result will be displayed as Min.

- **% Total Function:** When available, select this check box to have the report column in context totaled via percentages. The % Total aggregate function provides information on the percentage of the total for items on a report that are grouped. For example if the first group in the report has 10 and the total is 100, then the % total will display 10%. It will always add to 100% in the Grand Totals row located at the bottom of the report.

Tip

If you are using a Tabular report then the % Total function will not provide any value, as it will only display the 100% indicator at the bottom of the report.

The % Total option will be available for columns that have numeric values, such as custom fields that are of type integer or decimal and Budget or Actual Cost fields, to name a few.

- **Match:** If all rows within a particular report column have the same value then you can select the **Match** check box to have that value appear in the report column's total row.

To select aggregate functions to include in the report

1. In Step 4 of the Report Wizard, select the check box corresponding to the aggregate function(s) you want to use.
2. Click **Next** to proceed to the next step of the Report Wizard.

Configure Columns

Step 5 of the Report Wizard allows you to configure the report columns so that you can customize how the report will look once it has been run. They will be displayed from left to right when the report is run. To move a column, click the name of the column in the middle box, and click either the top, up, down, or bottom buttons.

Note: The columns listed will vary based on the columns selected in Step 3 of the Report Wizard.

To configure columns for the report

1. In Step 5 of the Report Wizard, select one or more of the following column configuration settings:
 - **Column Order:** All columns that were selected in Step 3 of the Report Wizard will appear in the Column Order section. Click a report column and use the directional arrows to rearrange the order of the column. Do the same with the other report columns to customize the order in which the columns will display.
 - **Sort Order:** Select a report column from the Sort Order drop down list and all the report columns included in this report will display. Click a report column, then click the Ascending radio button if you wish to have the column's contents arranged in ascending order; or click the Descending radio button if you wish to have it in the descending order. If not defined then the column will be appear in ascending order.
 - **Set Column Widths:** Hover over the column headers within the Set Column Widths section to see the column width arrow that allows the user to adjust the report column widths. Once you see the column width arrow beside a column, click it and drag to the right to make that report column wider, or to the left to make report column narrower.
 - **Set Column Highlights:** You can set column highlights whenever integer, decimal or currency fields are selected as report columns. First, define the column to highlight and the reference column; then define the low range, low-mid threshold, mid-range, mid-high threshold, and high range colors to be used.
 - **Logo:** Select a logo from the drop down list to add it to the report. A preview of the logo is displayed to the right.
2. Click **Next** to proceed to Step 6 in the Report Wizard.

Select Grouping

In step 6 of the Report Wizard, you can select columns to group your report by.

Example: If you wish to have all your project data grouped by the country pertaining to the project, then select this and see all rows for each country grouped together within the report.

Note: If you have selected a Tabular report (defined in step 2 of the Report Wizard) then step 6 of the Reports Wizard will be the Specify Filter step, as the grouping option is not available for this type of report. If you have selected either a Summary or Matrix report in Step 2 of the Report Wizard, then Step 6 of the Report Wizard allows you to configure row groupings so that your report rows are grouped together via the summary information specified.

Grouping for Summary Reports

If you selected a summary report in Step 2 of the Report Wizard, you can select one or two fields to summarize the information by.

To select the row grouping for a summary report

1. Select the appropriate field from the **Summarize Information By** drop-down list under Select Row Grouping. The options are dependent upon what type of data is being reported on (Step 1 of the Report Wizard).
2. Select an option from the **Sort Order** drop down list to display the results in either the ascending or descending order.
3. From the **Group Dates by** drop down list, select from the following options:
 - Date
 - Week
 - Month
 - Quarter
 - Year
 - Fiscal Quarter
 - Fiscal Year

Note: The Group Dates By field is enabled when you select a date field in the Summarize Information By field.

4. Repeat the previous steps in the **and then By** field to summarize the data by a secondary grouping method. When two row groupings are selected, the report will first summarize the data by the top selection and then by the second.

Report Wizard Step 6 of 7
Jump to step: Select Grouping

Step 6: Select columns to group your report by [Previous] [Next] [Cancel]

Select Row Grouping:
Summarize Information By: Project Name
Sort Order: Ascending
Group Dates by: Day

and then By:
Start Date
Sort Order: Ascending
Group Dates by: Month

[Run Report] [Print View] [Export] [Save As] [Previous] [Next] [Cancel]

Report Results

Ad Hoc Report [Hide Details] [Print View] [Export] [Edit] [Save As]

ACME Industries Filter By: None

Project Name	Finish Date	Finish Variance	Schedule Manager	Start Date
Project Type: Cap Maint.				
Create Date: 03.01.2007				
Chiller Replacement	07.09.2008	0h late	Service, Anthony	10.01.2007
Project Type: New				
Create Date: 08.01.2006				
CNC Machine Tools Installation	01.16.2008	4d late	Scheduler, Sam	08.01.2006
Create Date: 03.01.2007				
B3 Production Plant	08.21.2008	0h late	Nobil, Jeremy	02.01.2006
Crane Install	07.16.2008	8h late	Admin, Ally	01.30.2007
Project Type: Remodel				
Create Date: 08.01.2006				
Generating Station Redevelopment	12.12.2007	0h late	Scheduler, Sam	07.03.2006
Water Reactor Replacement	11.30.2007	0h late	Scheduler, Sam	04.14.2006
Workshop 2nd Bay Overhaul	08.08.2007	11d late	Scheduler, Sam	09.01.2006
Create Date: 03.01.2007				
Enclose Storage Area	09.18.2008	0h late	Amirault, Candace	02.01.2007
IT Finance and OS Remodel	04.24.2008	0h late	Antevy, Jon	07.02.2007
Line 34 - New Conveyor	10.29.2007	0h late	Service, Anthony	09.01.2006
Main Process Building	08.31.2009	0h late	Service, Anthony	05.01.2007
Office and Admin Remodel	08.04.2008	8.40w early	Service, Anthony	06.01.2006
Office Area Update	10.27.2008	0h late	Brown, Silas	02.01.2007
PKG A - Line Upgrade	04.20.2007	19.20w early	Nobil, Jeremy	10.06.2006
Storage Area 2B	12.18.2007	0h late	Service, Anthony	08.01.2007
Create Date: 04.01.2007				
B7 Production Plant Renovation	01.22.2009	0h late	Callia, Dan	05.01.2007

[Hide Details] [Print View] [Export] [Edit] [Save As]

5. Click **Next** to proceed to Step 7 in the Report Wizard.

Grouping for Matrix Reports

If you selected a Matrix report in Step 2 of the Report Wizard, you will be able to group both rows and columns on your report.

For details on summarizing the rows, see Grouping for Summary Reports.

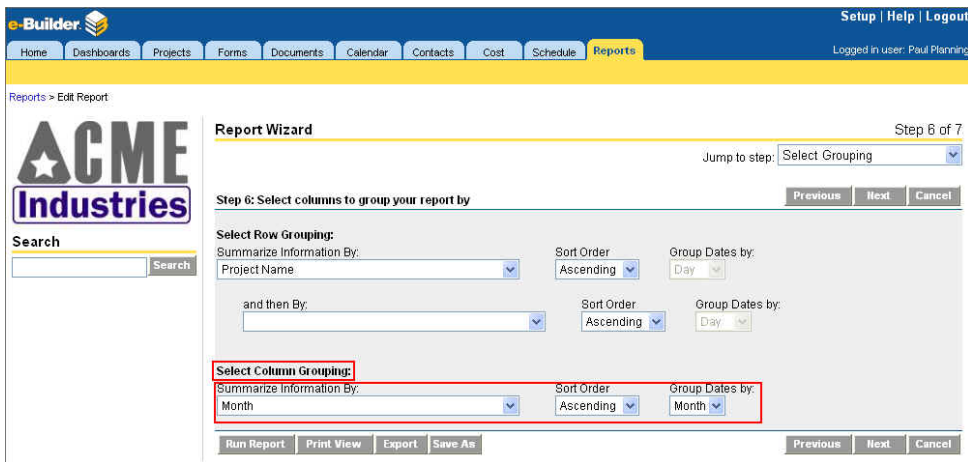
To select the column grouping for a matrix report

1. To select a column to summarize the information by, select the appropriate field from the **Summarize Information By** drop down list under Select Column Grouping. The options are dependent upon what type of data is being reported on (Step 1 of the Report Wizard).

2. Select an option from the **Sort Order** drop down list to display the results in either the ascending or descending order.
3. From the **Group Dates by** drop down list, select from the following options:
 - Date
 - Week
 - Month
 - Quarter
 - Year
 - Fiscal Quarter
 - Fiscal Year

Note: The Group Dates By field is enabled when you select a date field in the Summarize Information By field.

4. Click **Next** to proceed to Step 7 of the Report Wizard.



The report output will summarize the data into summary rows and columns, as shown below.

Reports > Report Results

Report Results

Cash Flow (Program Summary, Grouped by Month)

ACME Industries

Filter By: **Month** greater than 1/1/2007
Actuals As Of: 03.31.2007

	Amount This Period by Month (Grouped by Month)		
	Feb 2007	Mar 2007	Apr 2007
Project Name: Crane Install	970,000.00	115,000.00	430,064.11
Project Name: Office and Admin Remodel	56,450.00	0.00	0.00
Project Name: Office Area Update	3,171.00	9,072.24	6,750.00
Grand Totals	1,029,621.00	124,072.24	436,814.11

Tip

When running a cash flow report, the Matrix report type must be used.

Specify Filter Criteria

You can specify filter criteria for the report in the last step of the Report Wizard.

Step 7 of the Report Wizard allows you to customize what filtered data should be displayed within this particular report. You can zoom into really specific data filters that will expose certain values without having to search through the product. Or you can limit your filtering, in which case, more data will be returned based on what data was selected to be included in the report, specified in other steps of the wizard.

Note: This is step 6 when using a Tabular report, and step 7 when using a Summary or Matrix report.

Standard Date Filter

In this section, there is a drop-down for selecting the date fields available for just this report type (a subset of the fields in the full filter below). When the dates are entered, then only data that falls within that date range, for the selected column, will appear in the report.

The Duration drop-down includes a Custom selection, along with other selections for Fiscal Year, Fiscal Quarter, Calendar Year, Calendar Quarter, Month, and Weekday. When an option is chosen, the user is shown what the corresponding dates would be as of the current moment. Custom is the default (no start or end date are populated).

These standard filter values are saved with the report's definition.

To specify the standard date filter

1. From the **Columns** drop down list, select the date column you wish to filter the report by.
2. From the **Duration** drop down list, select a time duration for the report. The **Dates** fields are automatically populated with the corresponding dates, as of the current moment.

Tip: The Duration drop-down includes a Custom option, along with other options for Fiscal Year, Fiscal Quarter, Calendar Year, Calendar Quarter, Month, and Weekday. The default selection for this field is the Custom option (no start or end dates are populated). The selection in this field will omit data that doesn't match this date duration filter within the column specified above.

3. In the **Dates** field, click the date picker and select dates from the **Start Date** and **End Date** date pickers to change the automatically populated dates.

Tip: To remove the selection, click the **Clear** hyperlink. The Start and End Date fields will be cleared.

Filter Criteria

The Specify Filter step allows you to create and use up to five search rules in your report. With these search rules, the results of the report can be limited to show only a specific sub-set of the data that you have access to. For example, this is useful in cases where it is not necessary to include all projects on a report. Additionally, you are also able to use the same single project report for any project.

Note: To limit the report results to only one project, select the **Must select a project while running the report** check box in the filter criteria section. If this check box is selected, you will be prompted to select a project each time the report is run.

To create search rules

1. Select the field name to use for the filter from the first drop down list beside **Search Rule #1**. The second drop down list is enabled.

Note: The options available in this field are based on the type of data included in the report.

- From the second drop down list beside **Search Rule #1**, select the modifier condition of the filter.

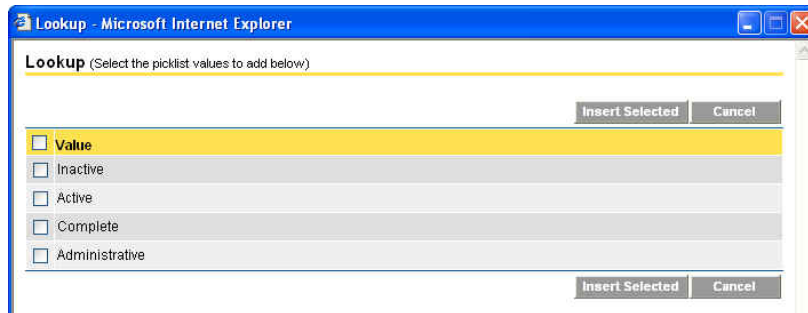
Tip

If you select a date field in the previous step, then there will be more options in this drop down list.

- In the last field, enter the desired value for use in the filter.

Tip

- For some fields, a Lookup button is available. The lookup button will prompt you to select from the options that are available as filters for the selected field. Click **Lookup** and a new window displays with options that can be selected. Select the check box(es) next to the appropriate selections and click the Insert Selected button to add the option(s) to the report. The Lookup window will then close and the specify filter page will reflect the selections that you have made.



- You can enter specific values so that data outside of those values do not appear in your report. You can enter multiple items separated by commas. For example, FL, GA searches for FL or GA. You can place quotes around data that includes commas. For example, "10,000" searches for 10,000. For yes/ no or on/ off fields, "1" equals yes or one and "0" equals no or off.

- Repeat the previous steps to define the other four search rules.

Note: The more search rules entered, the more zoomed in/ filtered the report data will become.

- Click **Save As** to save the report.
- Click **Run Report** to display the results of the report.

Save Reports

You can save reports that you create with the Report Wizard.

The types of reports are:

- **Personal reports:** Reports that are saved for use at the individual level.
- **Account-level reports:** Reports that are saved for use at an account-level.

Note: Only e-Builder Administrators (or those users the administrators grant the permission) are able to save reports for other users. All other users will only be able to save reports in their personal reports folder. Administrators can refer to Manage Permissions to learn how to give non-administrator users the permission to save reports to others.

To save a new report

1. In the Report Wizard, click **Save As**. The Save Report (As) page displays.
2. Complete the required fields (marked with an *):
 - **Report Name*:** Enter a name for the report.
 - **Report Description:** Enter a description of the report.
 - **Report Permissions:** Specify the report access permissions in this field. The following options are available:
 - **This report is available only to me:** Select this option to save the report as a personal report which is not available to other users.
 - **This report is available to all users:** Select this option to make the report available to all users. This option is available only for Administrators.
 - **This report is available to the following roles:** Select this option to make the report available to users with specific user roles. Select the user roles from the All Roles section and click the Add button to add them to the Roles With Access section. This option is available only for Administrators.
 - **Report Folder*:** Select a folder for the report. The Report Folder drop down list will become active if you make the report available to all users or to specified roles. If you chose to make the report a personal one, the Report Folder field is inactive and the report will be saved in your Personal Reports folder.
3. Click **Save** to simply save the report without executing.
—Or—
Click **Save and Run Report** to execute the report while saving it.

To modify and save an existing report under a new name

1. Open **Reports**.
2. On the Reports page, click the **Edit** link next to the name of the report you want to edit. The Report Wizard displays.
3. Make modifications to the report as needed.
4. Click **Save As**. The Save Report (As) page displays.
5. Click **Save** to confirm the changes to the report.
—Or—
Click **Save and Run Report** to retain the changes and run the report immediately.

Run Reports

From the Report Wizard page you can run the report and view the results at any time. This is also useful in setting up any new report as it will allow you to verify that the report meets your needs.

To run an existing report in e-Builder click its name. The results of the report will then be displayed on the screen.

To run a report

1. Open **Reports**.
2. On the Reports page, click the **Edit** link next to the name of the report you want to edit. The Report Wizard displays.
3. Click **Run Report**. The Report Results page displays.

To re-run a report

1. Open **Reports**.
2. On the Reports page, click the name of the report you want to run again. The Report Results page displays.
3. Click **Re-Run Report**. The Report Results page displays after the report is run again.

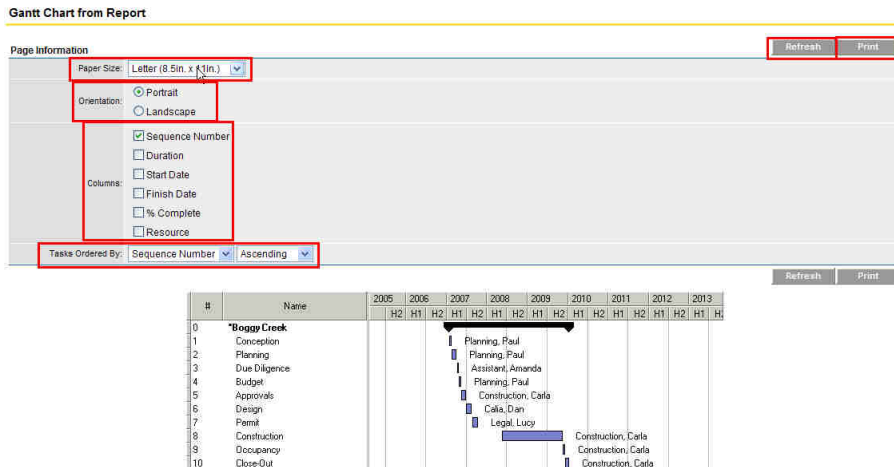
To view the Gantt Chart - printable report

A project's Gantt chart can be printed from within the Reports module.

Note: Only the Schedules and Tasks type of report can generate a Gantt Chart.

1. Open **Reports**.
2. On the Reports page, click the **Edit** link next to the name of the report you want to edit. The Report Wizard displays.
3. Click **Run Report**. The Report Results page displays.
4. To graphically view your schedule, click **Gantt Chart**. The Gantt Chart from Report window displays.

You will now be able to adjust the paper size and page layout of the print out. Add columns and order the tasks. Clicking the Refresh button will update the chart with any adjustments that you have made. The Print button will send the chart to your local printer.



Edit Reports

You may find it easier to modify an existing report to achieve the necessary output than it is to create a new report. Both account level and your personal reports can be modified and saved for later use.

You can even share a report with other team members after editing it.

To edit an existing report

1. Open **Reports**.
2. On the Reports page, click the **Edit** link next to the name of the report you want to edit. The Report Wizard displays.
3. Make modifications to the report as needed.
4. Click **Save** to retain the changes. The Save Report page displays.

Note: The Save button is available only to e-Builder Administrators who can edit and save an account level report.

5. Click **Save** to confirm the changes to the report.

—Or—

Click **Save and Run Report** to retain the changes and run the report immediately.

Note: A report can also be edited after it has been run. From the Report results page, click **Edit** to return to the Report Wizard and modify the report. See Run a Report for more details.

To share a report with team members

1. Open the Reports page.
2. Locate the report you want to share and click the **Edit** link for that report.
3. Make any necessary changes to the report, and then click **Save As**. The Save Report (As) page displays.
4. In the **Report Permissions** section, choose one of the sharing options:
 - **This report is available to all users:** If you chose to share the report with all users, click **Save** to retain your changes.

- **This report is available to the following roles:** If you chose to share the report with select roles, select the role(s) from the **All Roles** field and then click **Add**. The role(s) are added to the Roles With Access field.
- 5. From the **Report Folder** drop down list, select a folder for the report.
- 6. Click **Save**.

Import Reports

e-Builder allows you to import report files in the .xml format.

To import a report

1. Open the Reports page.
2. Click **Import Reports**.
The Import Reports - Select Import File page is displayed.
3. Click **Choose File** to browse for and select an import file.
4. Click **Open** to add the file to the Import Reports page.
5. Click **Next**.
The Import Reports - Review page is displayed.
6. Review the report that will be imported and click **Import**.
The report is added to the Reports main page and an import confirmation message is displayed.

Export Reports

You can export the results of a report from e-Builder into MS Excel for your convenience.

Note: The exported file will not include any row groupings, column groupings, or totals. It only includes the data from the report.

To export a report

1. Open the Reports page.
2. To export a report, click the **Export** link next to the name of the report.
3. In the dialog box that is displayed, select the radio button for the output format you wish to use. The following options are available:
 - **Excel Data Export:** Select this option to export the report in the Microsoft Excel Worksheet (.xlsx) format.
 - **CSV Data Export:** Select this option to export the report in the Microsoft Excel Comma Separated Values (.csv) format.
 - **Tab Delimited Text:** Select this option to export the report in the Text Document (.txt) format.
4. Click **Export**. A file download window will then open that will prompt you to open or save the export file.

Email Reports

After running a report, you can send the report results by email.

Note:

- There is a limit of 500 rows (users emailed to), for system speed and efficiency.
- The emailed file will not include any row groupings, column groupings, or totals. It only includes the data from the report. It will be sent as a MS Excel file.

To email a report

1. Open the Reports page.
2. To email a report, click the name of the report. The Report Results page is displayed.
3. Click **Send**. The Send Report window displays.
4. Complete all required fields (marked with an *):
 - **To***: Enter one or more email addresses in this field or click Lookup to search for and select users or contacts within e-Builder.
 - **Subject***: Enter a subject for the email message.
 - **Message**: Enter an optional message for the recipient.
5. Click **Send**.

Copy User Reports

As an Administrator, you can filter down and copy existing custom reports created by another e-Builder user and make it available to all other users in the Reports module.

To copy existing reports by another user

1. Open the **Reports** page.
2. On the Reports page, click **Copy User Reports**. The Copy User Reports page is displayed.
3. In the Filter Users section, use one or more of the following filter criteria to filter your search for a user:
 - First Name: Enter the first name of the user.
 - Username:
 - Role:
 - Custom Fields:
 - Last Name:
 - Company:
4. In the Users section, click on a user's name to see the list of reports for that user.

Delete Reports

Only e-Builder administrators can delete account level reports. Other users can delete their personal reports.

Warning: Once a report is deleted, it cannot be recovered.

To delete a report

1. Open **Reports**.
2. On the Reports page, click the **Delete** link next to the name of the report you want to edit. The Confirm Deletion page is displayed.

3. Click **Delete** to confirm the deletion. The report is deleted.
—Or—
Click **Cancel** to return to the Reports page.

Report Subscriptions

You can subscribe to any report that is saved.

When you subscribe to a report, the report is run automatically and the results are sent to you via e-mail at a specified (recurring or non-recurring) time and date. See Report Subscriptions for more details.

e-Builder Business Intelligence (BI)

e-Builder Business Intelligence (BI) empowers your organization to create powerful reports and dashboards that help drive better business decisions. This guide will help you create and format reports, add drill downs, and create and format dashboards that include interactive filter controls.

Use BI Reports and Dashboards to tell the story of your organizations construction projects by bringing Key Performance Indicators (KPIs) to life with dashboards and reports. The advanced visualizations (charts, graphs, maps) and formatting available in the tool can take your reporting to the next level. These features can be used with the base reports and reporting features you already enjoy in e-Builder.

Benefits of using e-Builder Business Intelligence

This module provides the following benefits:

For Executives

- Insightful program performance and forecasts
- Graphically assess complex data quickly
- Interactive, real-time answers about project and program status

For Administrators

- Report across multiple e-Builder modules
- Easily create dashboard reports with drag & drop fields
- Combine graphical reports with tabular reports in one view

For Project Managers

- Automated report production get more time back in your day
- Visually analyze data in an easy-to-read manner
- Create compelling project status reports everyone can trust

Report Types and Dashboards

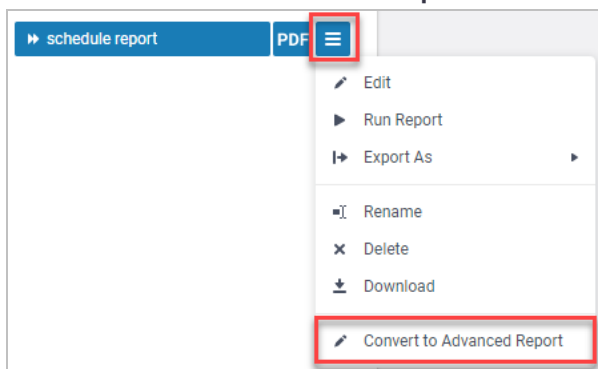
Business Intelligence reporting includes four report options and the ability to create dashboards:

- **ExpressView**: Enables you to explore data and get quick answers using drag & drop in a highly interactive designer.

- **Advanced Reports:** Allows you to create reports containing charts, maps, gauges, and images. You can add group sections to provide more flexibility in how data is displayed.
- **Dashboards:** Allows you to create an interactive canvas to combine and display reports, visualizations, images, charts, maps, gauges, text, and web pages.
- **CrossTab Reports:** Allows you to create reports that pivot data. The number of columns and rows in the CrossTab expands based on the data itself.
- **Chained Reports:** Allows you to combine multiple related or disparate reports into a single export (PDF, Excel, RTF, or CSV).

Express reports have been discontinued but you can continue to run any existing express reports without issues.

Note: To edit an existing express report, you will need to first convert it to an Advanced Report and then edit it as needed. In the Report Tree, click the more options button beside the express report's name and then click **Convert to Advanced Report**.



Permissions

There are two permissions associated with BI Reports that enable your organization to distinguish between those who may view reports and those who may both create and view reports and dashboards. The two types of BI report users are:


- **Report Viewer:** A typical report viewer is a business user that runs reports to track progress and analyze key performance indicators.
- **Report Designer:** A typical report designer is an administrator, power user or more technical resource that has a sense of the underlying data structure and understanding of the fundamentals of reporting such as sorting, filtering and formula creation.

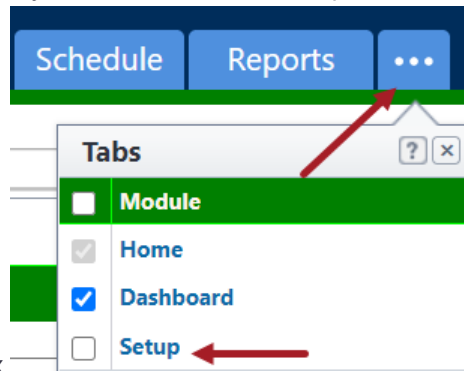
Note: Report Designers with Add/Edit rights may only add data that they have permission to access. For example, if they do not have access to e-Builder's Planning module they will not be able to add and view Planning data in reports, values for Planning will be blank.

Set BI permissions

Account administrators can manage permissions by role or set them for individual users.

To set BI permissions by role


1. From the top navigation tabs, click the **Setup** tab or from the Utility menu by clicking the drop-down arrow next to your user name. If the Setup tab is not visible, click , and then select the

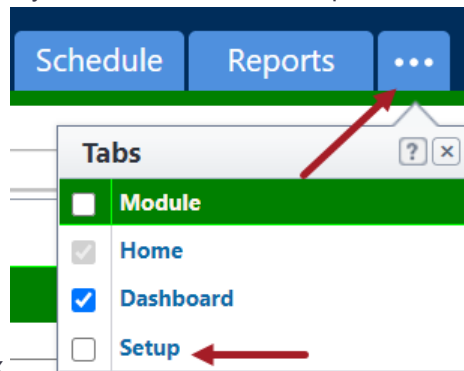


Setup check box.

2. In the **Administration Tools** section, click **Users**.
3. Click **Manage Permissions**.
4. Click the **BI Reports** tab and choose the required permissions.

To set BI permissions by user

1. From the top navigation tabs, click the **Setup** tab or from the Utility menu by clicking the drop-down arrow next to your user name. If the Setup tab is not visible, click , and then select the



Setup check box.

2. In the **Administration Tools** section, click **Users**.
3. Click **Permissions by User**.
4. Click the **BI Reports** tab and choose the required permissions.

e-Builder's Report Data Structure

The data available in advanced reporting is organized as per the following guidelines:

- Your organization's data is stored in a relational database.
- The data is made available to you in advanced reporting as categories of data (e.g. Invoices).

- Some categories are joined together and some are not.

Tip: Joins are links between two data categories that enable you to pull data from both onto one report.

- There is a category that joins project, cost, schedule and process together for reporting on overall project status.

From Table	From Column	To Table	To Column	Relationship	Join Type
SubmittalPackage	ProjectID	Project	ProjectID	ManyToOne	Inner
SubmittalItem	ProjectID	Project	ProjectID	ManyToOne	Inner
SubmittalPackage	SubmittalPackageID	SubmittalItem	SubmittalPackageID	OneToMany	Left
SubmittalItem	SubmittalItemID	SubmittalItemReviewer	SubmittalItemID	OneToMany	Left
Companies	CompanyID	Contacts	CompanyID	OneToMany	Left
Companies	CompanyID	ProjectCompanies	CompanyID	OneToMany	Left
ProjectCompanies	ProjectID	Project	ProjectID	ManyToOne	Inner
Contacts	ContactID	ProjectContacts	ContactID	OneToMany	Left
ProjectContacts	ProjectID	Project	ProjectID	ManyToOne	Inner

From Table	From Column	To Table	To Column	Relationship	Join Type
					r
BudgetLineItem	BudgetID	Budget	BudgetID	ManyToOne	Inner
BudgetLineItem	BudgetID	Budget	BudgetID	ManyToOne	Inner
Budget	ProjectID	Project	ProjectID	ManyToOne	Inner
BudgetChange	BudgetID	Budget	BudgetID	ManyToOne	Inner
Budget	ProjectID	Project	ProjectID	ManyToOne	Inner
BudgetChangeItem	BudgetChangeID	BudgetChange	BudgetChangeID	ManyToOne	Inner
BudgetChangeItem	BudgetLineItemID	BudgetLineItem	BudgetLineItemID	ManyToOne	Inner
CommitmentItem	CommitmentID	Commitment	CommitmentID	ManyToOne	Inner
CommitmentItem	BudgetLineItemID	BudgetLineItem	BudgetLineItemID	ManyToOne	Left
Commitment	ProjectID	Budget	ProjectID	ManyToOne	Inner

From Table	From Column	To Table	To Column	Relationship	Join Type
					r
Commitment	ProjectID	Project	ProjectID	ManyToOne	Inner
Commitment	CompanyID	Company	CompanyID	OneToOne	Inner
Commitment	ContactID	Contact	ContactID	OneToOne	Left
CommitmentItem	EquipmentItemID	EquipmentItems	ItemID	ManyToOne	Inner
CommitmentChangeItem	CommitmentChangeID	CommitmentChange	CommitmentChangeID	ManyToOne	Left
CommitmentChange	CommitmentID	Commitment	CommitmentID	ManyToOne	Left
Commitment	ProjectID	Budget	ProjectID	ManyToOne	Inner
Commitment	ProjectID	Project	ProjectID	ManyToOne	Inner
Commitment	CompanyID	Company	CompanyID	OneToOne	Inner
Commitment	ContactID	Contact	ContactID	OneToOne	Left

From Table	From Column	To Table	To Column	Relationship	Join Type
CommitmentChangeItem	CommitmentItemID	CommitmentItem	CommitmentItemID	ManyToOne	Left
CommitmentItem	BudgetLineItemID	BudgetLineItem	BudgetLineItemID	ManyToOne	Left
CommitmentItem	EquipmentItemID	EquipmentItems	ItemID	ManyToOne	Inner
InvoiceItem	InvoiceID	Invoice	InvoiceID	ManyToOne	Inner
Invoice	ProjectID	Project	ProjectID	ManyToOne	Inner
Invoice	ProjectID	Budget	ProjectID	ManyToOne	Inner
Invoice	CompanyID	Company	CompanyID	OneToOne	Inner
Invoice	ContactID	Contact	ContactID	OneToOne	Left
InvoiceItem	BudgetLineItemID	BudgetLineItem	BudgetLineItemID	ManyToOne	Left
CommitmentItem	BudgetLineItemID	BudgetLineItem	BudgetLineItemID	ManyToOne	Left
CommitmentItem	CommitmentID	Commitment	CommitmentID	ManyToOne	Inner

From Table	From Column	To Table	To Column	Relationship	Join Type
					r
CommitmentItem	EquipmentItemID	EquipmentItems	ItemID	ManyToOne	Inner
FundingSource	ProjectID	Project	ProjectID	ManyToOne	Inner
FundingSource	ProjectID	Budget	ProjectID	ManyToOne	Inner
FundingSource	FundingSourceID	InvoiceFundingSource	FundingSourceID	OneToMany	Left
InvoiceFundingSource	InvoiceItemID	InvoiceItem	InvoiceItemID	ManyToOne	Left
FundingSourceTransactions	ProjectID	Project	ProjectID	ManyToOne	Inner
Budget	BudgetID	BudgetLineItem	BudgetID	OneToMany	Left
Budget	ProjectID	Project	ProjectID	ManyToOne	Inner
Budget	BudgetID	BudgetLineItem	BudgetID	OneToMany	Inner
Cashflow	ProjectID	Project	ProjectID	ManyToOne	Inner

From Table	From Column	To Table	To Column	Relationship	Join Type
Cashflow	ProjectID	Budget	ProjectID	ManyToOne	Inner
Budget	BudgetID	BudgetLineItem	BudgetID	OneToMany	Left
FormSummary	ProjectID	Project	ProjectID	ManyToOne	Inner
RoleMembers	RoleID	Roles	RoleID	ManyToOne	Inner
RoleMembers	ProjectID	Project	ProjectID	ManyToOne	Inner
RoleMembers	UserID	User	UserID	ManyToOne	Inner
EquipmentItems	ProjectID	Project	ProjectID	ManyToOne	Inner
ProjectActivity	ProjectID	Project	ProjectID	OneToOne	Inner
CapitalPlans	CapitalPlanID	CapitalPlanItem	CapitalPlanID	OneToMany	Left
CapitalPlanItem	CapitalPlanItemID	CapitalPlanCashflowData	ItemID	OneToMany	Left
CapitalPlanItem	ScenarioID	PlanScenario	ScenarioID	OneTo	Le-

From Table	From Column	To Table	To Column	Relationship	Join Type
				One	ft
CapitalPlanItem	PortalID	Project	ProjectID	OneTo-One	Left
Project	ProjectID	PlanScenario	PortalID	OneTo-One	Inner
PlanScenario	ScenarioID	ScenarioCategory	ScenarioID	OneTo-Many	Left
ScenarioCategory	ScenarioID	ScenarioItem	ScenarioID	OneTo-Many	Left
ScenarioItem	ScenarioCategoryID	ScenarioCategoryCash-flowData	ScenarioCategoryID	OneTo-Many	Left
Documents	ProjectID	Projects	ProjectID	ManyTo-One	Inner
CalendarEvent	ProjectID	Projects	ProjectID	ManyTo-One	Inner
CalendarEvent	ProjectID	Projects	ProjectID	ManyTo-One	Inner
CalendarEvent	EventID	MeetingMinuteItem	EventID	OneTo-Many	Inner
CalendarEvent	ProjectID	Projects	ProjectID	ManyTo-One	Inner


From Table	From Column	To Table	To Column	Relationship	Join Type
CalendarEvent	EventID	CalendarEventAttendee	EventID	OneTo-Many	Inner
BidPackage	PortalID	Project	ProjectID	ManyTo-One	Inner
BidPackage	PackageID	Bidders	PackageID	OneTo-Many	Left
Bidders	ContactID	Contact	ContactID	OneTo-One	Inner
InvitedBidders	ContactID	Contact	ContactID	OneTo-One	Inner
Contact	CompanyID	Company	CompanyID	OneTo-One	Inner
BidPackage	PackageID	InvitedBidders	PackageID	OneTo-Many	Left
InvitedBidders	BidID	BidDetails	BidID	OneTo-Many	Left
BidDetails	BidItemID	BidScopeItem	BidScopeItemID	OneTo-One	Inner
BidPackage	PackageID	BidScopeSection	PackageID	OneTo-Many	Inner
BidScopeSection	BidSectionID	BidScopeItem	BidScopeSectionID	OneTo-Many	Left

From Table	From Column	To Table	To Column	Relationship	Join Type
			tionID		
BidCoverage	PackageID	BidPackage	PackageID	OneToOne	Inner
ProcessInstance	ProjectID	Project	ProjectID	ManyToOne	Inner
ProcessRoutingHistory	ProjectID	Project	ProjectID	ManyToOne	Inner
ProcessActors	ProjectID	Project	ProjectID	ManyToOne	Inner
AuditLog	UserID	User	UserID	OneToOne	Inner
Schedule	ProjectID	Projects	ProjectID	OneToOne	Inner
< Form Instances >	ProjectID	Project	ProjectID	ManyToOne	Inner
< Process Instances >	ProjectID	Project	ProjectID	ManyToOne	Inner
< Process Instance - Commitment Change >	EntityID	CommitmentChange	CommitmentChangeID	OneToOne	Inner

From Table	From Column	To Table	To Column	Relationship	Join Type
< Process Instance - Commitment >	EntityID	Commitment	CommitmentID	OneToOne	Inner
< Process Instance - Budget Change >	EntityID	BudgetChange	BudgetChangeID	OneToOne	Inner
< Process Instance - Invoice (Commitment or General) >	EntityID	Invoice	InvoiceID	OneToOne	Inner
< Process Instance - Dynamic Cost >	InstanceID	DLI_< Process Instance >	InstanceID	OneToOne	Inner
DLI_< Process Instance >	BudgetLineItemID	BudgetLineItem	BudgetLineItemID	ManyToOne	Inner

Create and Run Express View Reports

ExpressView is a report building tool that combines grouping, sorting, filtering, and summarizing data with a drag-and-drop interface. A chart can be added with a single click, and the entire report can be exported as PDF, RTF, CSV, an Excel workbook or save it as an Advanced Report.


Note: For more detailed information on creating ExpressView reports, click the Get Help  button within the Report Designer.

To create and run an Express View report

1. On the top navigation menu, click the **Reports** tab.
2. Click the **Add BI Report** button and select **ExpressViews** from the drop-down list. A New ExpressView tab is displayed. You can add different elements to this report using the ExpressView Report Designer.

3. Drag and drop data fields from the data objects pane on the left to the canvas on the right.

Tip: The interactive canvas will display prompts with available actions. For example, when creating a new ExpressView, "Drag a field on the canvas" will be displayed. Once at least one column is on the canvas, an "Add Group" drop zone will be displayed.

4. To add a formula as a new column, click the **Add Formula** link at the top of the data objects pane to access the Formula Editor dialog box. For a list of functions and aggregate functions, please refer to the Reporting section and Formula section on the Exago Support Center website.
5. Right-click a column or click the Column Menu icon  in the column's header to access the column menu. You can group, filter and sort both detail rows and groups using the options in this menu.
6. Use the following options in the toolbar to modify the report:

- **Refresh:** Refresh the data displayed in the report
- **Canvas:** Set ExpressView styling options for the canvas such as a color theme and a font
- **Chart:** Add a visualization, specify whether to show/ hide an existing visualization
- **Export:** Export the report in PDF, RTF, CSV, Excel file formats or save it as an Advanced Report.

7. Use any of the following options on the properties pane to modify the report:

Tip: The properties pane is displayed on the right side of the ExpressView Report Designer. The active tab is indicated by an underlined and highlighted icon.


- **Selected Section:** Define the characteristics of the column and the formatting of its data
 - **Sorts:** Edit or remove existing sorts for detail rows
 - **Filters:** Add, edit or remove filters
 - **Visualizations:** Configure charts in the report
8. After making the desired changes click the **Save** button on the toolbar. The following fields are available on the Save Report dialog box:
 - **Report Name:** Add a name for the report. This is a required field.
 - **Report Description:** Add a description for the report.
 - **Report Permissions:** Specify users who can access the report. The following permission options are available:
 - **This report is available only to me:** Select this option to have the report be available only to you. The report will be saved in the My Personal Reports folder.
 - **This report is available in the following folder and to all users:** Select this option to have the report be available only to all users.
 - **This report is available in the following folder and roles:** Select the roles with access to the report from the **All Roles** field and add them to the **Roles With Access** field using the arrow buttons.
 - **Folder:** Select the folder to which the report is saved. This field will be displayed only when the **This report is available to all users** option or the **This report is available to the following roles** option is selected in the Report Permissions field.

9. Click **Okay** to confirm your changes and save the report.
10. To run the ExpressView report, click the **Run** button on the toolbar. The Report Viewer opens in a new tab.

Note: If you make any changes in the Report Designer, you will need to run the report again in a new Report Viewer tab.

Create and Run Advanced Reports

Advanced Reports are created using the spreadsheet-like cell-grid interface of the interactive Advanced Report Designer. These reports can be scheduled, added to Chained Reports and Dashboards, embedded into web pages, used to populate document templates, and can be exported to multiple formats.

Note: For more detailed information on creating Advanced reports, click the Get Help  button within the Report Designer.



To create and run an Advanced report




1. On the top navigation menu, click the **Reports** tab.
2. Click the **Add BI Report** button and select **Advanced Reports** from the drop-down list. A New Advanced Report tab is displayed along with the Add Data Objects dialog box.
3. To include data objects on the report grid, expand the data objects tree structure on the left pane, select an object and click the right arrow. The selected data object is added to the panel on the right side.
4. Click **Okay**.


Tip: The Add Data Objects dialog can be opened at any time by clicking the **Manage Data Objects** button in the Data Objects pane.

5. To add a new section to the report, click the **Add Section** button.

Tip: Right-click anywhere on the Section header to access the Section menu with more options such as adding, modifying, moving and deleting report sections. You can also set the section shading using this menu. The report header and footer can also be added and formatted here.

6. Use any of the following toolbar sections to modify the report:
 - **Undo:** Undo or redo any action on the report by clicking the appropriate icon in this section.
 - **Filter and Sort:** Create, modify or remove filters and sorts on the report in this section.
 - Click the  icon to open the Report Filters dialog box. Filters limit the data on the report based on specific criteria.
 - Click the  icon to open the Report Sorts dialog box. Sorts order the data on the report.

- **Cell Contents:** Use this section to insert items into the selected cell, link to other reports and hide duplicated values from appearing after one another in a report.
 - **Insert:** Click the  icon and select from the available options to insert them. Charts, gauges, geocharts, CrossTab reports, images and formulae may be inserted.
 - **Linked Report:** Click the  icon to open the Linked Report dialog box where you can specify reports to link to, select data objects and fields to use for linking as well as optionally specify a formula to filter the results in the linked report.
 - **Hide Repeated Values:** Click the  icon to prevent a cell from repeating duplicate values on subsequent rows.
 - **Formatting:** Use the options in this section to format cells, change the background or foreground color, copy formatting from one cell to another, modify the font style and alignment.
 - **Advanced:** Use the options in this section to access additional option dialog boxes to control the advanced features of the report such as report viewer options, general options, templates and parameters.
 - **Save and Run Reports:** Use the options in this section to save, export or run the report. The report can be exported in Excel, PDF, RTF or CSV file formats.
7. To add a formula directly to the cell, select the cell and enter it directly into the Formula bar in the toolbar.

Tip: Click the Formula Editor icon  to access the standard Formula Editor dialog box. Just as in the Formula Editor, the formula syntax will be highlighted as it is entered in the Formula bar, and the system will make suggestions as you build functions.

Note: For a list of functions and aggregate functions, please refer to the Reporting section and Formula section on the Exago Support Center website.

8. Right-click a cell to access the cell menu. You can cut, copy, paste, clear cell contents, format cells, and insert images, gauges or formula using the options in this menu.
9. After making the desired changes click the **Save** button on the toolbar. The following fields are available on the Save Report dialog box:
- **Report Name:** Add a name for the report. This is a required field.
 - **Report Description:** Add a description for the report.
 - **Report Permissions:** Specify users who can access the report. The following permission options are available:
 - **This report is available only to me:** Select this option to have the report be available only to you. The report will be saved in the My Personal Reports folder.
 - **This report is available in the following folder and to all users:** Select this option to have the report be available only to all users.


- **This report is available in the following folder and roles:** Select the roles with access to the report from the **All Roles** field and add them to the **Roles With Access** field using the arrow buttons.
 - **Folder:** Select the folder to which the report is saved. This field will be displayed only when the **This report is available to all users** option or the **This report is available to the following roles** option is selected in the Report Permissions field.
- 10. Click **Okay** to confirm your changes and save the report.
- 11. To run the advanced report, click the **Run** button on the toolbar. The Report Viewer opens in a new tab.

Note: If you make any changes in the Report Designer, you will need to run the report again in a new Report Viewer tab.

Create and Run Dashboards (BI)

Dashboards allow you to combine several related reports into one unified viewing space and display them. Existing reports can be added to a dashboard, and new visualizations can be created directly on the dashboard itself. Images, text, other web sites, and interactive filters can also be added. After a dashboard has been created or updated, it can be saved to a report folder.

Dashboards can be exported as a Chained Report from the Dashboard Designer.

Note: For more detailed information on creating dashboards, click the Get Help  button within the Dashboard Designer.

To create and run a dashboard

1. On the top navigation menu, click the **Reports** tab.
2. Click the **Add BI Report** button and choose the **Dashboard** report type from the drop-down menu. The Dashboard Designer is displayed.

Tip: To create another new BI dashboard while already working in the dashboard designer, click the **+** button on the left-most pane.

3. Add new tiles and modify the dashboard as needed.
4. On the dashboard designer, click the **Save** button on the toolbar. The following fields are available on the Save Report dialog box:
 - **Report Name:** Add a name for the dashboard report. This is a required field.
 - **Report Description:** Add a description for the dashboard report.
 - **Report Permissions:** Specify users who can access the dashboard report. The following permission options are available:
 - **This report is available only to me:** Select this option to have the report be available only to you. The report will be saved in the My Personal Reports folder.
 - **This report is available in the following folder and to all users:** Select this option to have the report be available only to all users.

- **This report is available in the following folder and roles:** Select the roles with access to the report from the **All Roles** field and add them to the **Roles With Access** field using the arrow buttons.
 - **Folder:** Select the folder to which the dashboard report is saved. This field will be displayed only when the **This report is available to all users** option or the **This report is available to the following roles** option is selected in the Report Permissions field.
5. Click **Okay** to confirm your changes and save the dashboard.

Dashboard Designer

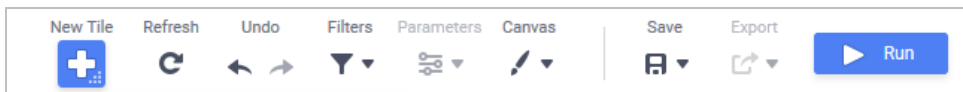
The dashboard designer can be used to add reports, text, images and web pages to a dashboard.

Within the dashboard designer, you can


- Add tiles from the dashboard designer toolbar on the top portion of the designer.
- Place the tiles on the canvas as needed
- Move and resize the tiles
- Modify the style and content of the tiles as well as specify advanced settings for the tile using the tile properties pane on the right side of the window and the toolbar.


Dashboard Designer Toolbar

The top of the Dashboard Designer contains a Toolbar for creating and interacting with the canvas and the tiles.










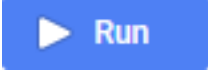
This toolbar contains the following buttons and menus:

-  **New Tile:** Add a new tile or element by clicking the new tile button and dragging it to the dashboard canvas. Once added, it can be resized and dragged to the proper location.

Tip: Right-click the Tile Menu icon  on the tile to access the Tile Menu where you can delete or duplicate the tile.

The following types of content are available to select from:

- **New Visualization:** Add a graphical representation of data that can be designed directly on the dashboard canvas without first creating a report.
- **URL:** Embed another web page inside the dashboard.
- **Text:** Enter text that can be formatted and styled.
- **Image:** Select and upload an image from your computer.

- **Filter:** Add several styles of interactive filters which can affect multiple reports on the dashboard.
- **Existing Report:** Add an existing report with any filters or parameters applied to it.
-  **Refresh:** Refresh the data in all the tiles on the canvas. The Refresh Reminder icon  indicates that one or more tiles on the canvas may not have the most up to date information. The data will be entered in the database only when the Refresh button is clicked.
-  **Filters:** Add filters to the dashboard. Prompting filters applied to existing reports on the dashboard will also be displayed.
-  **Parameters:** Edit parameters for reports that contain parameters. This button will be enabled only if report tiles on the dashboard contain parameters.
-  **Canvas:** Control how the tiles fit onto the canvas and set default styling options. Click the Canvas icon to open the canvas pane and set the Fit and Style options.
-  **Save:** Save the dashboard. Use the drop-down list options to change the name and description of the dashboard when saving.
-  **Export:** Export the contents of existing reports and visualizations on the dashboard as different export types (Excel, PDF, RTF, CSV) and then use it as needed.
-  **Run:** Launch the dashboard viewer.



Canvas

The canvas is a grid on which tiles can be arranged.

Tiles

Each element on a dashboard is placed on the canvas within a tile that can be dragged to the desired location, resized and styled. These tiles are arranged on a grid, and can snap into place next to each other.

Tiles contain the following elements:

- **Content:** View and interact with the content of the tile in this area.
- **Tile Header:** Add an optional header to be displayed in the tile.
-  **Refresh Reminder:** Each visualization or existing report tile has a small Refresh icon in the top right corner. Clicking this icon will reload the content of the tile from the data source.
- **Tile Menu:** Click the  icon to view additional options for tiles.

- **Move handle:** Click and drag the move handle to move the tile around on the canvas. Hold the **Shift** key while dragging the move handle to stretch the tile to fit the available space.

The following types of tiles can be added to the canvas:

- **Visualizations:** In the dashboard designer, you can perform the following actions for a data visualization tile:
 - Drag data fields onto the canvas to create a chart or a tabular report.
 - Use the toolbar and the tile properties pane to filter, name or modify other settings of the visualization.
 - Save the data visualization as a new **Standard Report**.

Note: A data visualization must have at least two data fields in order to display a chart, one of which must be numeric.

- **URL:** To add a web page to the dashboard, drag and drop the URL tile onto the dashboard canvas. On the Content tab in the Tile Properties pane, enter the desired URL and click **Apply**. You can specify image fit and tile settings on the Style tab of the Tile Properties pane.
- **Image:** Drag and drop the Image tile onto the dashboard canvas, to add an image to the dashboard. Click **Browse** to search for and select an image to upload to the dashboard. You can specify image fit and tile settings on the Style tab of the Tile Properties pane.
- **Text:** Text items can be formatted using the Fit, Tile and Text settings on the Style tab in the Tile Properties pane. You can specify text options like the font, font size, color and alignment. You can also select a background color and border settings.

Tip: A text tile must be selected for these changes to be applied.

- **Parameters:** When a report is added to the dashboard and it contains one or more parameters, those parameters are imported to the dashboard in the Parameters popup menu. Click any of the parameter items in the popup menu to open the parameter item detail menu. For each parameter, you can add and modify the following settings:
- **Existing Reports:** Any existing report can be added to a dashboard. Existing filters and parameters can be modified using the dashboard designer. The fit settings for report tiles can be formatted using the Fit settings on the Style tab in the Tile Properties pane. You can also select the tile header color and border settings using the Tile settings.


Tip: A text item must be selected for these changes to be applied.


- **Filters:** When you add a report with prompting filters to a dashboard, the filters will be displayed in the Filters popup menu. You can then drag the desired filter and drop it onto the canvas to apply it to the report. For each filter, you can add and modify the following settings:
 - **Filter Field:** Allows you to select the data field to filter on.
 - **Operator:** Allows you to change the filter operator. Click the lock icon to toggle whether other users are allowed to select an operator when running the dashboard.

- **Value:** Allows you to set the value or values for the filter or parameter. If the filter or parameter is interactive or prompting, then other users can select different values when running the dashboard.



Note: A web page may not be displayed in the dashboard if embedding within another web page is not permitted for the web page.

To add a tile to a dashboard

1. On the dashboard designer page, click the  icon.
2. From the New Tile popup menu, click and drag the desired type of tile onto the dashboard canvas.

Tip: Alternatively, you can click and drag the  icon onto the canvas to add a new tile placeholder to the canvas. Click the icon in the placeholder corresponding to the type of tile you want.

Tile Properties Pane


In the Title field, you can add a title for the tile. This title will be displayed on the canvas when editing the dashboard and can be toggled on or off using the  button. You can also select the font size, color, font style and alignment settings for the title from the popup menu displayed when clicking the  button on the Tile Properties pane.

On the Tile Properties pane, you can modify the settings for a tile using options on the following tabs:

- **Content:** Use this tab to change the report or visualization in the tile. Only reports of the same type as the existing tile can be selected.
- **Style:** Use this tab to specify how the tile appears on the canvas and the fit settings. Data visualization tiles have additional settings like color, labels and number formats.
- **Advanced:** Use this tab to specify dashboard designer refresh settings, dashboard viewer settings and navigation settings for reports and refresh settings and data display settings for visualizations.






Create and Run CrossTab Reports

Also known as pivot tables, CrossTab Reports display and summarize data in a way that expands dynamically both vertically and horizontally depending on the number of data groupings.

Note: For more detailed information on creating CrossTab reports, click the Get Help  button within the Report Designer.

To create and run a CrossTab report

1. On the top navigation menu, click the **Reports** tab.
2. Click the **Add BI Report** button and select **CrossTab Reports** from the drop-down list. A New CrossTab Report tab is displayed.
3. Complete the following steps in the CrossTab wizard to create the new CrossTab report:
 - a. **Name:** Enter a name, select a folder and enter a description for the report.
 - b. **Categories:** Select data objects to include on the report.
 - c. **Filters:** Select the filter fields to include on the report.


Tip: Click the **Add Formula** button to access the standard Formula Editor dialog box. For a list of functions and aggregate functions, please refer to the Reporting section and Formula section on the Exago Support Center website.
 - d. **Layout:** Specify the layout for the report.
4. Using the Cross Tab Data Designer, perform any of the following actions:
 - Drag and drop data fields to the Row Header Source pane to add rows. Click the Edit Header icon  to access the Header Options menu.
 - Drag and drop data fields to the Column Header Source pane to add columns. Click the Edit Header icon  to access the Header Options menu.
 - Click the Formula Editor icon  to insert a formula into the row header or column header.
 - Drag and drop a data field to the Tabulation Data Source pane to specify the field used to collect data. Click the Edit Tabulation Data icon  to access the Tabulation Options menu.
5. Optionally, choose a theme from the **Theme** drop-down list to quickly apply colors and fonts to the content.
6. Optionally, click the Options icon  to choose report display and aggregation options.
7. After making the desired changes click the **Save** button on the toolbar. The following fields are available on the Save Report dialog box:
 - **Report Name:** Add a name for the report. This is a required field.
 - **Report Description:** Add a description for the report.
 - **Report Permissions:** Specify users who can access the report. The following permission options are available:
 - **This report is available only to me:** Select this option to have the report be available only to you. The report will be saved in the My Personal Reports folder.
 - **This report is available in the following folder and to all users:** Select this option to have the report be available only to all users.
 - **This report is available in the following folder and roles:** Select the roles with access to the report from the **All Roles** field and add them to the **Roles With Access** field using the arrow buttons.

- **Folder:** Select the folder to which the report is saved. This field will be displayed only when the **This report is available to all users** option or the **This report is available to the following roles** option is selected in the Report Permissions field.
8. Click **Okay** to confirm your changes and save the report.
 9. To run the CrossTab report, click the **Run** button on the toolbar. The Report Viewer opens in a new tab.


Note: If you make any changes in the Report Designer, you will need to run the report again in a new Report Viewer tab.

Create and Run Chained Reports

Chained reports give you the ability to save multiple reports in one output file (PDF, Excel, RTF, or CSV). This reduces the time it takes to prepare reports for senior staff and is especially helpful when you need to print reports or dashboards.

Note: For more detailed information on creating Chained reports, click the Get Help  button within the Report Designer.

To create a chained report

1. Click **Reports** from the **Top Navigation** menu.
2. Click **Add BI Report** and choose a report type from the following list:
 - Express Views
 - Advanced Reports
 - Dashboard
 - CrossTab Reports
3. From the toolbar, click the **Create New Report** icon and select **Chained Report**.
A New Chained Report tab is displayed where you can select the reports you want to combine.
4. On the **Name** tab, enter a name for the chained report and select a folder to save it in. You can also enter a description of the report here, if needed.
5. Click the **Next** button to continue to the next step of the wizard.
6. On the **Reports** tab, add the reports to be included in the chained report by clicking and dragging them to the right pane.
The order of the reports in the list is the order in which they will be displayed in the output. Click and drag a report or use the up or down arrow icons to move a report up or down in the list. Click the delete icon to remove a report from the list.
7. Click the Edit Report Options icon  to access the Report Properties dialog box. Use the **Filters** and **Parameters** tabs to set options for handling promptable filters and parameters on the component reports.
8. Click the **Next** button to continue to the next step of the wizard.

9. On the Options tab, use the following settings to set certain report options:
 - **Default Export Type:** Select the file type to which the chained report will export by default. Choose the **Default** option to use the environment's default export type.
 - **Allowed Export Types:** Select which file types the chained report is allowed to export to. At least one type must be selected.
 - **No Data Qualified Action:** Choose what to display if there is no data to display when the report is executed. You can choose to show a placeholder or skip to the next report in the chain.
 - **Collate Reports on:** Select this option to collate the chained report. This option is enabled only when all of the reports in the chain share at least one common sort field. The sort field must be a standard column type without a formula.
 - **Page break after each report:** Select this option to start a new page after every report. This only affects PDF and RTF files.
10. To export the report, click the **Export Report** drop-down list and choose the desired output type. The file formats available are Excel, PDF, RTF, CSV.
11. Click **Save and Close** to save the report and close the wizard.

Schedule

All scheduling tools include a few fundamental components and concepts, and e-Builder's Scheduling tool adheres to these fundamentals.

The level of functionality available to you is determined by the module that your company purchased. Your security permission determines the actions that you are allowed to perform with schedules.

To access the Schedule

1. On the top navigation tabs, click the **Snippet-Label** tab.
2. Click the **Project** drop-down menu and select the project name. The **Snippet-Label** page is displayed.

To access the Schedule page in a project

- If you are in a project, on the left navigation pane under the **Project Menu**, click **Schedule**. The **Schedule** page is displayed.

To access the Schedule page from the Schedule module

- If you are in the Schedule module, click the **Schedules** sub-menu located on the top-right corner.

Module Attributes

The Schedule module has several levels of functionality that are determined based on what your company purchased from e-Builder and what attributes have been activated on your account. Each level of functionality builds on the previous level, and they are not reversible to a lower level once activated. These attributes affect all projects within an account.

1. **Schedule:** A critical path method (CPM) scheduling tool for project tasks
2. **Multiple Calendars (MC):** Option to create multiple calendars within each project and assign tasks to different calendars.

No extra charge. The account administrator can contact Support and request to enable this for your account.
3. **Resource Management (RM):** Option to link resources to schedule tasks. Add-on feature available through Sales.
4. **Resource Management with Cost (RMC):** Option to link resources or schedule tasks to the cost module. Add-on feature available through Sales.

Permissions

Each project participant has security permissions that determine what can be seen and done inside the Schedule module. These permissions are controlled by your account administrator.

- **Manage Permissions:** On the Schedule tab of the Manage Permissions page, grant members and roles permission to view schedules, manage templates and manage baselines.
- **Manager Role:** On the Details tab of your schedule, users assigned to this role have full access to create, edit, and update the project schedule. Users without this role (without Manage Template permissions on the account level) will not be able to create a schedule but if they have the View Schedule permission, they can view it once the schedule has been created by a Schedule Manager.

Note: A user must be assigned to an administrative type role (such as a Schedule Manager role) in order to initiate a schedule in a brand new project. Users belonging to this role will have permission only to create schedules and manage schedule templates. This role can only view Cost information and will not have any other Cost permissions.

- **Task Resource Role:** (does not apply to RM or RMC accounts) This role is assigned to individual tasks. Users in the Resource Role can update the following information on that task:
 - % Complete value
 - Duration
 - Start date
 - Finish date
 - Constraint Type and Constraint Date
 - Add Comment through the Task Editor

Note: A Task Resource contact can also be assigned to a task as an indicator of the key responsible person for that task. However, that individual does not receive any notifications or have any special editing rights compared to other users in the Resource role.
- **Task Manager Role:** (does not apply to RM or RMC accounts) This role is assigned to individual tasks. Users in the Manager Role can update the Resource Role and the following information on that task:

- Task Name
- Description
- Resource Role and Resource User
- Predecessor relationships
- Master Task associations

Note: A Task Manager contact can also be assigned to a task as an indicator of the key responsible person for that task. However, that individual does not receive any notifications or have any special editing rights compared to other users in the Manager role.

Fundamentals

Tasks

Schedules consist of a list of tasks to be completed for a particular project. Tasks can be linked together or be dependent on one another according to the specific relationships set by the Schedule Manager. For example, the Schedule Manager may specify that a 60% Design Document task can only begin after a previous 30% Design Document task is completed – these are referred to as predecessor and successor tasks. Thus, the Schedule Manager will build the Tasks and the relationships between Tasks to specify what must be done and by when to ensure a successful project outcome. Additionally, the Schedule Manager determines the duration or time available to complete each task.

Tasks are the basic building blocks of a project. Each task will have a beginning and a duration, which will establish the scheduled date for when it is expected to be complete.

Dependencies, Predecessors and Successors

For illustration purposes, let's take a look at an example project that a residential contractor might develop to construct a brand new home. In this example, we'll list some basic components required to construct a home:

1. Install underground plumbing
2. Install underground electrical lines
3. Form and place the foundation slab
4. Erect the exterior walls
5. Erect the roof framing
6. Install the roof
7. Erect the interior walls
8. Install rough electrical
9. Install rough plumbing
10. Install doors and windows

Each step in the above example is called a task. You can perform some of these tasks at the same time, and there are some tasks that need to be completed before the next task can begin. For example, installing underground plumbing and installing underground electrical lines can be accomplished simultaneously. However, you must erect the exterior walls before erecting the roof framing because the

roof framing sits on top of the exterior walls. When one task depends on the other, the relationships between the tasks are called dependencies. If a task depends on another task, then the one that has to finish first is called the predecessor. The task that follows the predecessor is called the successor.

We abbreviate relationships with F = Finish and S = Start. The first letter defines the action of the “Predecessor” Task and the second letter defines the action of the Successor Task. So we use an “FS” or Finish-to-Start relationship when the Predecessor task must Finish before the Successor task Starts. Meanwhile, if two tasks can occur simultaneously, they have a “SS” Start-to-Start relationship where the Predecessor task must Start before the Successor task Starts. Sometimes there is a lag of X number of days included in the relationship. For instance, the Contractor may schedule a “SS 5” relationship between Underground Plumbing and Underground Electrical where they want to Start the Installation of Underground Plumbing 5 days prior to Starting the Installation of Underground Electrical because the plumbing lines will be installed beneath the Electrical lines.

Finish to Start (FS) - Task 2 cannot start until task 1 finishes

Finish to Finish (FF) - Task 2 cannot finish until task 1 finishes

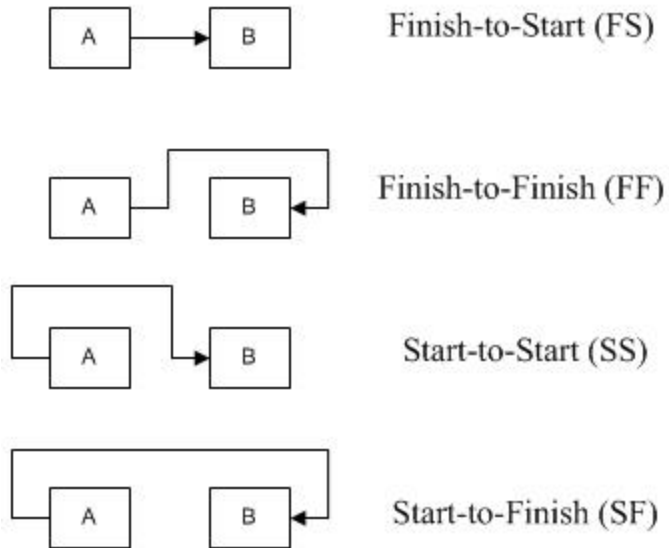
Start to Start (SS) - Task 2 cannot start until task 1 starts

Start to Finish (SF) - Task 2 cannot finish until task 1 starts

Additional Example

A STOP sign cannot be positioned until the concrete is laid down. Therefore, laying the concrete is the predecessor task. In addition to this, the concrete must not dry completely, otherwise, the STOP sign cannot be installed. In this case, we might include a Lag of 1 hour after the concrete has been poured out, because the concrete still needs to be moist, but not completely dry. In this scenario, the Link Type would be Start to Start (SS) because we cannot start the task of placing the STOP sign until the task of pouring concrete has begun.

You can identify predecessors in the import file by including the task number and the abbreviated link type, such as 2SS or 3 FS; and lag time, such as +5 days, -3days. However, these tasks can be updated after the schedule has been established. For instructions, see Predecessor Tasks.



Tasks and Subtasks

There can be a number of tasks that make up another task. When a task has many pieces to it and it is broken down, the pieces are called subtasks. The subtasks then roll-up to a summary task, which includes the total duration of all the subtasks. For example, Building Shell is a Summary Task that consist of the following sub tasks:

- Install underground plumbing
- Install underground electrical lines
- Form and place the foundation slab
- Erect the exterior walls
- Erect the roof framing
- Install the roof

You could organize these subtasks in other ways too - this is just an example.

Duration, Start and Finish Dates

Now it is time to define the timing of each task and the start and finish dates. You can start with an estimate for each task. Referring back to our example, suppose that you make the following estimates:

- Install underground plumbing – 15 days
- Install underground electrical lines – 15 days
- Form and place the foundation slab – 10 days
- Erect the exterior walls – 20 days
- Erect the roof framing – 10 days
- Install the roof – 10 days

The amount of time it will take to complete each task is referred to as the duration. The activities mentioned above are all considered tasks.

In addition, there may be certain points in your schedule that are considered important in that these items are critical for the success of the project. For example, inspections might be scheduled to get tasks approved. We will refer to these items as milestones. Milestones are tasks with zero duration, and in e-Builder, because they are zero duration, milestones have the same start and finish date.

Free Slack and Total Slack

The amount of time that a task can be delayed before it affects a dependency or the overall project completion date is known as slack. Free Slack is the number of days that a task can fall behind schedule without affecting the start date of its earliest successor task. Total Slack is the number of days that a task can fall behind schedule without affecting the project completion's late finish date. These calculations can be useful if a resource needs more time on a task or you need to determine where you can squeeze in additional tasks that have been added in after the initial schedule was created without affecting the finish date. Often times your project team cannot alter the finish date of the project but you are required to add scope. In these circumstances, identifying your available slack can help you determine where to add these additional tasks.

Schedule Baselines

Going back to our example, you may want to take a snapshot of all the planned Tasks and original Start and finish Dates of each task to establish goals on your schedule requirements from start to finish. This is often referred to as the baseline. In e-Builder, you can choose to use a baseline as a point of reference when monitoring your project. So, for example, if the Contractor slips a bit on completing the Erect exterior walls Task, you have a way to measure the actual status against your baseline. The difference between the scheduled/actual start or scheduled/actual finish of a task and the baseline start or finish of that task is referred to as the variance. This is yet another tool to help monitor the schedule's health.

Terminology

This section defines the terminology used throughout the Schedule module. This topic is a useful resource to learn the terms and concepts used in the e-Builder Schedule module. The following terms are defined below:

Baseline

A snapshot of the aspects of a project at the beginning. A baseline is used to compare actual task durations, start and end times to what was anticipated at the beginning of the project.

Critical Path

The tasks that must be completed on time in order for the project to finish on schedule. A delay in the completion of these tasks will delay the end date of the project. Critical path tasks are indicated by the red lettering used for the task name. (Classic UI only)

	Task Name	Duration
+	Design	124d
	Publish RFP	0.67mo
	Bidder Selection Process	0.67mo
-	Design and Engineering	115.03d
	Design Building Addition	54.20d
	Assemble Technical Data for Heat Pump	7.20d
	Review Technical Data on Heat Pumps	29d
	Review and Approve Designs	24.63d
	Start Office Building Addition Project	0d

The three points summarized below define the importance of calculating the critical paths:

The duration of the critical path identifies the total duration of the project.

Since we have identified the critical path, we also know which tasks cannot be delayed without affecting the finish date of the project.

Conversely, those tasks that are not part of the critical path can in fact be delayed without affecting the finish date of the project.

Dependencies

When one task depends on another, the relationships between the tasks are called dependencies.

Duration

The amount of time allowed to finish a task.

Event

While still treated as a task in regards to duration, start and finish time, an event is classified as a meeting or an approval of item(s). Specifying events gives the System Admin or Schedule Manager the ability to better manage the schedule by identifying when work is actually being done versus a decision making or approval process that may or may not impact the schedule.

Free Slack

The number of days that a task can fall behind schedule without affecting the start date of its earliest successor task.

Master Process

Master processes are created by the account administrator to categorize and report on Master Tasks. Project schedules use these processes to filter and view activities in the schedule.

Master Task

Master tasks are a standard set of tasks used in multiple project schedules. The power of master tasks lies in cross-project reporting. Project schedules typically include a subset of these master tasks and regular tasks. The account administrator will maintain these processes and tasks.

Milestone

Certain points in the schedule that are considered important in that these items are critical for the successful completion of the project. When monitoring multiple projects in e-Builder, it is helpful if all projects have the same Milestones to be able to report consistently.

Predecessor

In a relationship where one task depends on another task, the task which has another task dependent on it is called the predecessor, and can also be referred to as the controlling task.

Schedule

Schedules consist of a list of all the tasks to be completed for a particular project.

Schedule Manager

The Schedule Manager is responsible for developing the schedule. This person will determine the order of the tasks, their duration (the time allotted for each task to be completed), allocate resources to each task, and then monitor the project while it is underway to compare the projected outcome to the actual outcome.

Slack

The amount of time that a task can be delayed before it affects a dependency or the overall completion date of the project.

Subtasks

When a task has many pieces to it and it is broken down, the pieces are called subtasks.

Successor

In a relationship where one task depends on another task, the dependent task is called the successor.

Summary Task

This is a high-level task with subtasks underneath it. For instance, Design might be a summary task the there are tasks the make up design. Summary task views gives you an overall picture of when an area of the project will be completed.

Task

Tasks are the basic building blocks of a project schedule; tasks make up the schedule. After the schedule manager builds out the schedule, they will assign resources to each of the tasks. Based on the duration assigned and the placement of the task, a start and end date is automatically applied.

Task Manager

The person responsible for managing the tasks of a particular project phase, such as Design or Construction phase tasks.

Task Resource

The person responsible for completing an individual task. This person will typically report to the task manager.

Template

A predefined pattern or makeup that you can use as the basis for setting up a future project. Templates are created by an Account Administrator and they can choose to apply this template to the project, which will automatically give you a basis to start with when building out the project schedule. If a template is not applied to the project, the Account Administrator can make schedule templates available for the schedule manager to use. Available template options display in a drop-down menu when applying a schedule template.

Total Slack

The number of days that a task can fall behind schedule without affecting the project completion's late finish date.

Variance

The difference between the scheduled/actual start or scheduled/actual finish of a task and the baseline start or finish of that task.

Create Schedules

Only one schedule is permitted per project. If you are creating a schedule for a project, you will see the Create Schedule page where you can complete the details of the schedule, which is a preliminary step before adding tasks. Setting up schedule details means defining the days that make up the work week, the start date of the project, number of hours per work day and choosing the schedule manager role and user. From here, you will also determine whether or not an external scheduler will be used conjointly with the e-Builder Schedule module.

To access the Schedule page

1. On the top navigation tabs, click the **Schedule** tab.
2. Click the **Project** drop-down menu and select the project name. The **Schedule** page is displayed.

To create a schedule

1. Open the Schedule page.
The **Create Schedule** page is displayed if a schedule has not been created for the project.
2. On the **Create Schedule** page, complete the details of the schedule.
3. Click **Save**.

The **Schedule** page is displayed.

Tasks Tab

Tasks Pane

Contains a list view of tasks by row and of fields by columns. Field availability is based on module attributes for the account, and edit capabilities are based on user roles. Changes made to the Tasks pane are saved for the user per project.

	#	Task Name	Duration
e	0	Seattle Hospital a	10.15 months
1	1	b Contractor	4 days
1.1 c	2	d Supply Lot Sale Ag...	1 day

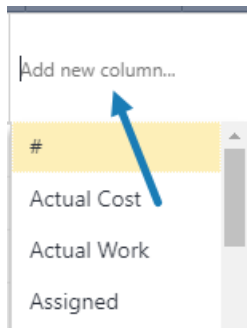
- Project summary:** Displays a total of the tasks duration. It also reflects the earliest start date and latest end date for all the tasks in the schedule.
- Task Summary:** The blue arrow indicates there are tasks grouped under this task. Click to show all the tasks under the task.
- Work Breakdown Structure (WBS) number:** Represents the task's relative place in the schedule hierarchy.
- #:** Represents the task number. This is the number referenced in the Predecessor and Successor columns. This column does not appear by default and will need to be manually added to the Tasks pane.
- Status indicator:** Each color indicates the status of the task.
 - Blue = Complete
 - Red = late
 - Yellow = early
 - Orange = no baseline
 - Green = on time

On the Tasks pane, you can:

- **Resize pane:** Drag the splitter line between the Task pane and the Gantt chart left or right to change the visible space in each area.

% Complete	Rollup	
5.23	No	← →
30.77	Yes	
100	No	← →
100	No	Sup
100	No	Supply

- **Add a column:** Click **Add New Column** and select a column name from the dropdown list.



- **Remove a column:** Click on the column header down arrow and uncheck the column name.

% Complete	Rollup	Status
5.23		
30.77	Yes	
100	No	
100	No	
100	No	

Columns ▶

Duration
 Start
 Finish
 % Complete
 Rollup

- **Move a column:** Click on the column header and drag to the desired location. A green check mark appears when you are dragging the column to an acceptable location.





Duration	Start	Finish
10.15 months	12.01.2018	19

Duration

Gantt Chart

Contains a graphical time-scaled view of task durations and relationships.

On the Gantt chart, tasks are represented by the following graphical components:

- **Summary task:** Green bar 
- **Task:** Blue bar 
- **Task Baseline:** Gray bar
- **Milestone (zero duration):** Green diamond 
- **Relationships:** Blue arrows 
- **Critical Path:** Tasks and arrows highlighted in red



Toolbar Buttons

The gray toolbar that contains buttons for navigation and actions. Depending on your user roles, the following buttons are available:

- **Add Task:** This button is not visible to Task Resources. Only Schedule Managers and Task Managers are able to see this button. Click to add a single task.
- **Outdent:** Decreases the indentation level of the selected task in the tree. This button is only available to Schedule Managers or users with Manage Templates permission. For instructions, see Move Tasks within the Schedule.
- **Indent:** Increases the indentation level of the selected task in the tree. This button is only available to Schedule Managers or users with Manage Templates permission.
- **Undo:** Click to undo the last action. This button is only available to Schedule Managers or users with Manage Templates permission.
- **Redo:** Click to redo the last action. This button is only available to Schedule Managers or users with Manage Templates permission.
- **Import:** Click to import tasks using an .MPP file (Microsoft Project 2003, 2007, 2010, 2013). This button is only available to Schedule Managers or users with Manage Templates permission. For details or instructions, see Working with Schedule Imports.
- **Expand:** Shows all the tasks and subtasks.
- **Collapse:** Collapses the subtasks under their tasks.
- **Previous / Next:** Moves the time axis backward / forward in time in units specified by the current view.
- **Zoom In/Out/Fit:** Click to zoom in or out the timeline. Click Fit to change the timeframe of the scheduling chart to fit all the events in it.

- **Working Time:** Click to open the Manage Calendars dialog box. If your account has the Resource Management (RM) or Resource Management with Costs (RMC) option enabled, you have the ability to manage calendars.
- **Templates > Apply Template:** Select the schedule template that has been created by your e-Builder account administrator or someone with manage templates permissions. Templates give schedule managers a basis for starting the project schedule. This button is only available to Schedule Managers or users with Manage Templates permission. For instructions, see [Manage Templates](#).
- **Templates > Save as Template:** Click to save the current schedule as a personal template or as an account template to be used throughout the account. This button is only available to Schedule Managers or users with Manage Templates permission. For instructions, see [Manage Templates](#).
- **Critical Path:** Click to highlight in red the critical paths that can affect the end date of the project.
- **Export:** Click to export e-Builder schedule as a PDF or as an .XML file, which can then be uploaded to Microsoft Project. This button is only available to Schedule Managers or users with Manage Templates permission. As a Schedule Manager, if you use Microsoft Project conjointly with e-Builder as your scheduling tool, through the import and export options, you can work seamlessly with both utilities. For instructions, see [Export Schedules](#).
- **Send:** Click to send the schedule or the selected tasks to users in the project or external users using their email address. The Send Schedule dialog also allows you to send a message to the recipients.
- **Snapshot:** Click to save a snapshot of the schedule. A snapshot can be taken at any time. Ideally, you should save a baseline before the project gets underway to give you a basis for comparing your progress. In most cases, after the baseline is saved, a snapshot is taken on a monthly basis. Saving a Schedule Snapshot will keep a "picture" in e-Builder of where a Schedule was as the time the snapshot was taken. Snapshots can then be compared to the baseline or later snapshots for progress analysis. To see all the snapshots that have been taken, click the Snapshot tab toward the bottom of this page. This button is only available to Schedule Managers or users with Manage Templates permission. For instructions, see [Schedule Snapshots](#).
- **Set:** Click to save a baseline of your schedule. For instructions, see [Manage Schedule Baseline](#).
- **Toggle:** Click to show or hide the baseline.

Columns Available in all Schedules

- **Task Name:** Displays the name of the task
- **Duration:** Task duration in days (Note: for parent tasks, the units automatically changes to Weeks for Duration >20 days, and changes to Months, for Durations >26 Weeks)
- **Predecessors:** The tasks that precedes the task (Options are FS, SS, FF, SF)
- **Successors:** The tasks that succeeds the task (Options are FS, SS, FF, SF)
- **Start:** The planned start date for a task.
- **Finish:** The planned finish date for a task.

- **% Complete:** The manually updated progress, as a percentage of duration, on a task (may also be automatically calculated as of the current date, if the schedule setting is enabled to "Automatically calculate the % complete").
- **Early Start:** The earliest date that a task can start based on any dependencies and constraints.
- **Early Finish:** The earliest date that a task can finish based on the Early Start date plus Duration, as well as any dependencies and constraints.
- **Late Start:** The latest date that a task can start in order to meet any successor Milestones (such as a Project Finish No Later Than Constraint on a Project Finish milestone)
- **Late Finish:** The latest date that a task must finish in order to meet any successor milestones (such as a Finish No Later Than Constraint on a Project Finish milestone).
- **Baseline Duration:** The duration in days on each selected task at the moment that the baseline was last set.
- **Baseline Start Date:** The start date on each selected task at the moment that the baseline was last set.
- **Baseline Finish Date:** The finish date on each selected task at the moment that the baseline was last set.
- **Baseline % Complete:** The manually updated progress, as a percentage of duration, on each selected task at the moment that the baseline was last set.
- **Calendar:** Select from the available project calendars.
- **Constraint:** Select the type of constraint to be applied to a task (Options are: None, As late as possible, As soon as possible, Finish no earlier than, Finish no later than, Must finish on, Must start on, Start no earlier than, Start no later than)
- **Constraint Date:** Select the date that is desired to coincide with the constraint type. To remove a constraint, you must first change the Constraint Type to "None".
- **Critical:** Indicates that a task is on the critical path (longest path) for the project schedule.
- **Start Variance:** Start Variance = Start - Baseline Start Date
Values are either: *N* days Late, *N* d Early, or 0d (Example: 2d Early, 3d Late)
- **Finish Variance:** Finish Variance = Finish - Baseline Finish Date
Values are either: *N* days Late, *N* days Early, or 0d (Example: 2d Early, 3d Late)
- **Free Slack:** The number of days that a task can fall behind schedule without affecting the start date of its earliest successor task.
- **Total Slack:** The number of days that a task can fall behind schedule without affecting the project completion's late finish date.
- **Master Process:** When configured on the account, select the Master Process number that you wish to associate with a task.
- **Status:** The status of a task compared to its Baseline Finish Date (Statuses are: Draft, Not Baselines, On Time, Early, Late, Complete)

- **Manual mode:** When enabled, it allows users to change a task's dates manually and ignore schedule dependencies. To enable it, click on the cell and select the check box.
- **Master Task:** When configured on the account, select the Master Task that you wish to associate with a task.
- **Milestone:** Indicates whether the task is a zero duration milestone.
- **Rollup:** Indicates all parent tasks (Values are Yes, No)

Additional Columns

Based on which schedule modules that have been enabled on your account, the following columns may be available:

- **Assigned Resources:** Select a resource from the resource pool on the account. From the Assigned Resource column, you may also select the role from the available Resource Roles on the account, and adjust the units, which is the desired % of an assigned resource's work day.
- **Mode:** The scheduling mode which dictates how e-Builder will calculate either the task's Duration, Work, or Units. For more information, see [Schedule Mode](#).
- **Calendar:** Select one of the calendars for the selected task.
- **Budget Line Item:** The Account Code selected for Resource Cost
- **Work:** The total resource hours on a task.
- **Baseline Work:** Total resource hours on a task at the moment that the last baseline was last set.
- **Planned Work:** Resource hours on a Task that are linked to Budget Line Items.
- **Actual Work:** Work x % Complete
- **Remaining Work:** Work – Actual Work
- **Cost – Total Resource Cost:** Each Assigned Resource's Work x their corresponding (Rate + Burden)
- **Baseline Cost:** Total Resource Cost on a task at the moment that the last baseline was last set.
- **Planned Cost:** Total Resource Cost on a task that are linked to budget items.
- **Actual Cost:** Cost x % Complete
- **Remaining Cost:** Cost – Actual Cost
- **Estimated Work at Completion:** Sums the greater of Planned Work or Actual Invoice Work for every assigned resource.
- **Approved Invoice Work:** Resource Hours from Approved or Paid Invoices
- **Remaining Invoice Work:** Estimated Work at Completion – Approved Invoice Work
- **Estimated Cost at Completion:** Sums the greater of Planned Cost or Actual Invoice Cost for every assigned resource.
- **Approved Invoice Cost:** Resource cost from Approved or Paid Invoices
- **Remaining Invoice Cost:** Estimated Cost at Completion – Approved Invoice Cost

- **Work Variance:** Work – Baseline Work
- **Cost Variance:** Cost – Baseline Cost +Over,-Under

Details Tab

General

- **Manager Role:** Select the role that the schedule manager belongs to from roles that have "View Cost" permissions. Doing so will enable the subsequent drop-down menu, which allows you to choose the appropriate user in this role. Users in the designated Schedule Manager role can create the schedule and tasks, edit schedule details, create and apply templates, and update tasks. These permissions are not limited to only the individual named in the Schedule Manager User field.
- **Manager User:** This menu is enabled only after a role is selected from the preceding Manager Role drop-down menu. Click the drop-down arrow to assign the manager user. This field is intended as a reference to the primary project contact for the schedule. Any user in the project having the same role as the "Manager Role" will be able to edit the schedule and manage resources on the schedule.
- **Use External Scheduler:** Select whether or not an external scheduler will be used. This feature should be turned on only if another scheduling software, such as Primavera 6, is your primary scheduling tool and e-Builder will only be used to make scheduling information available to internal staff, or if the schedule is being pulled into Cash Flow projections. If set to Yes, all action buttons will be disabled in the e-Builder Schedule module and you will only be able to import and export tasks in an Excel spreadsheet. This setting also makes it possible to update multiple project schedules in a single import. This can be disabled at anytime. For information and instruction on working with another scheduling tool, see Enable External Scheduler.
- **Automatically calculate the % complete:** When selected, e-Builder calculates the % complete on a pro-rated basis for any task with a Start Date and/or Finish Date in the past (before the current date). If the Task Finish Date is in the past, the Task is updated to 100% complete.
- **Link Resource Cost to the Budget:** This option is available only when 'Resource Management with Cost' has been enabled on the account.

None: Default setting - This setting is disabled.

Tasks to Budget Line Item: Allows Schedule Manager to select a single Budget Line Item for Resource Costs on a Task.

Tip: Choose this option for projects where all the resources who are assigned to a single task charge their time to the same budget line item or account code.

Resources to Budget Line Item: Allows the schedule manager to select a single budget line item per resource assigned to any task. Can result in multiple budget line items for resource costs on a task if resources are linked to different budget line items.

Tip: Choose this option for projects where different resources working on the same task can charge time to different budget line items or account codes.

Calendar

- **Start Date:** Click the calendar icon to choose a project start date. You can also use free-text entry in mm/dd/yyyy format.
- **Hours per day:** Enter the number of hours that will make up the work day. By default, the work week is Monday - Friday, 8 hours per day, and 40 hours per week.

Tip

If Saturday and Sunday are added to the work week, increase the hours per week to 56 and days per month to 30. Otherwise, task durations will automatically adjust to the days and hours per week entered.

- **Hours per week:** Enter the number of hours that will make up the work week. By default, the work week is Monday - Friday, 8 hours per day, and 40 hours per week.

Tip

If Saturday and Sunday are added to the work week, increase the hours per week to 56 and days per month to 30. Otherwise, task durations will automatically adjust to the days and hours per week entered.

- **Days per month:** Enter the number of working days per month. By default, the work week is Monday - Friday, 8 hours per day, and 40 hours per week.
- **Calendar:** Only available to MC, RM and RMC account attributes. Select one of the calendars or click Manage Calendar to create another one.
- **Manage Calendar:** Only available to MC, RM and RMC account attributes. Use the Manage Calendars dialog box to edit or create a new calendar. From here you can set the working days and hours, as well as set the exceptions (e.g., holidays).

Custom Fields Tab

If applicable, this tab lists the schedule custom fields. Custom field values can be modified by editing schedule details.

Snapshots Tab

Lists all saved snapshots and gives you the ability to compare multiple snapshots to one another. To save and compare snapshots, see [Manage Schedule Snapshots](#)

History Tab

Provides a history of the activities and actions taken in the Schedule module. This tab is a great resource for the auditing process.

Importing Schedules

e-Builder supports multiple methods for updating schedules. Schedules may be updated manually through the e-Builder schedule interface or changes may be imported from one of two supported file types. Microsoft Excel (exported from Primavera 6) and .mpp files (exported from Microsoft Project) are both compatible with e-Builder imports, but each file type import affects the use of the project schedule differently.

Important Note

When a project team decides to use the "External Scheduler" setting, e-Builder assumes that you are using an advanced scheduling program such as Primavera P6 to handle all logic and calculations outside of e-Builder.

Note: To use an external scheduler, admin users must enable this feature. Admin users must first contact Support to activate this feature at their account level.

To enable a project schedule for Excel imports

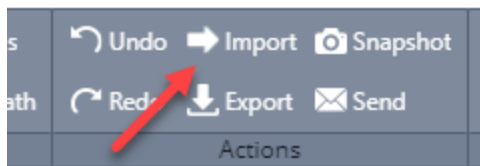
1. Open the Schedule page.
2. On the **Details** tab, in the **General** section, next to the **Use External Scheduler** drop-down, select **Yes**.
3. Click **Save**.

Import Microsoft Project Imports (.mpp)

If Microsoft Project (MS Project) is used in conjunction with the e-Builder Schedule module, you can easily keep your project schedule updated in e-Builder, which gives you the ability to work seamlessly with both tools. The .mpp file import is the standard e-Builder schedule import, therefore it can be used to override an existing schedule or reconcile changes. However, in order to do subsequent updates to the schedule, an initial import of the schedule must first be completed. Typically, importing a project schedule is standard when starting a new project schedule. This import type identifies differences between both schedules and updates the e-Builder schedule accordingly. Pertinent e-Builder data such as cash flow links and custom field values can also be maintained through this schedule import.

To import .mpp project schedules

1. Open the Schedule page.
2. On the **Tasks** tab, in the schedule toolbar, click **Import**.



Note:

- If this is your first schedule import, update options are not displayed.
- For subsequent updates, choose the default update option: 'Synchronize all tasks with my e-Builder schedule'. If you choose the second option of adding tasks to the existing schedule, you will no longer be presented with options while updating and the imported tasks will automatically appended to the existing schedule.

3. On the **Import Schedule** page, click **Choose File**.
4. Select your .mpp file and click **Open**.
5. Click **Next**.
6. If necessary, map built-in e-Builder fields with those in your .mpp file.

7. Click **Next**.
8. After reviewing the import summary, click **Import**.

Import Schedule Using Excel

This type of import is ideal for clients who are using another tool as their primary scheduler, such as Primavera 6 (P6).

Multiple projects can be updated in a single import by including a column for the Project Identifier - values would include either the project name or project number. The table below lists all required and optional fields that should or can be included in the import file.

Note: If your project schedule is enabled to use an External Scheduler, only Excel files may be imported.

List of required and optional fields for import file

e-Builder Field Name/ Import File Column Header	Description	Required/Optional
Project Identifier	Select a Project Identifier. This is a unique ID that will identify which project the schedule import is for. e.g., project name, project number. This ID must match the Project ID or Name of the e-Builder project. When importing tasks for multiple projects, this field must be mapped. To learn more about project numbers, see Create Project Number Custom Field.	Required
Task Name	Map this field with its corresponding column in the Excel spreadsheet.	Required
Task ID	The Task ID is only visible in BI reports. It must be unique, cannot end with letters, and cannot contain special characters other than a period. Max. 50 characters.	Required
Duration	Task duration refers to the amount of time it will take to complete a task. If there are no start and end dates specified, they will be automatically populated based on the duration, the project's timeframe and the sequence of the	Required

e-Builder Field Name/ Import File Column Header	Description	Required/Optional
	task within the schedule.	
Sequence Number	Sequence number refers to the number assigned to the sequence of the task. It can use the same field as Task ID or a separate custom field. Can use decimals to establish roll-up task hierarchy (e.g., 1, 1.1, 1.2, 2, 2.1). No alpha characters (A-Z) are allowed. Max. 10 integers for each level.	Required
Start Date	This column denotes the date the task will begin. If a start date is not specified, the start and end dates will automatically populate based on the duration, the project's timeframe and the sequence of the task within the schedule. Note: P6 does not auto-populate a Start Date on Finish Milestones)	Required
Finish Date	This column denotes the date the task will end. If a finish date is not specified, the start and end dates will automatically populate based on the duration, the project's timeframe and the sequence of the task within the schedule. Note: P6 does not auto-populate a Finish Date on Start Milestones)	Required
Baseline Start Date	Map this field to its corresponding column in the Excel spreadsheet. A baseline start date can be set for the overall project schedule, or particular project phases.	Optional
Baseline Finish Date	Map this field to its corresponding column in the Excel spreadsheet. A baseline finish date can be set for the overall project schedule, or	Optional

e-Builder Field Name/ Import File Column Header	Description	Required/Optional
	particular project phases.	
Baseline % Complete	Map this field to its corresponding column in the Excel spreadsheet. A baseline percentage complete can be set for the overall project schedule, or particular project phases.	Optional
Actual Duration	Map this field to its corresponding column in the Excel spreadsheet. This figure denotes the time it actually took to complete this task.	Optional
Actual Start Date	Map this field to its corresponding column in the Excel spreadsheet. This figure denotes the date that the task actually began.	Optional
Actual Finish Date	Map this field to its corresponding column in the Excel spreadsheet. This figure denotes the date that the task was actually completed.	Optional
% Complete	Map this field to its corresponding column in the Excel spreadsheet. This figure is the task's completion percentage.	Optional
Constraint Type	<p>Map this field to its corresponding column in the Excel spreadsheet. Constraint types set the parameters as to the timing of the task. Options include:</p> <ul style="list-style-type: none"> • As Late as Possible • As Soon as Possible • Finish no Earlier Than • Finish no Later Than • Finish On • Start No Later Than • Start On 	Optional
Constraint Date	Map this field to its corresponding column in	Optional

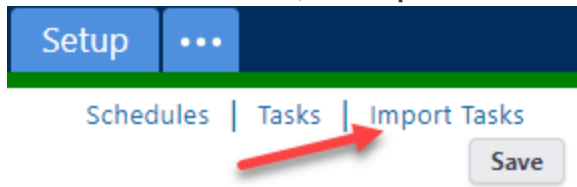
e-Builder Field Name/ Import File Column Header	Description	Required/Optional
	<p>the Excel spreadsheet. Constraint date is only necessary for the following constraint types:</p> <ul style="list-style-type: none"> • Finish no Earlier Than • Finish no Later Than • Finish On • Start No Later Than • Start On <p>Enter the date the appropriate dates based on the selected constraint type.</p>	
Milestone	<p>Map this field to its corresponding column in the Excel spreadsheet.</p> <p>Include a check mark in this column for all tasks that are considered milestones. Milestones are tasks that are considered critical for successful project completion, such as receiving the certification of occupancy, for example.</p>	Optional
Type	<p>Map this field to its corresponding column in the Excel spreadsheet.</p> <p>Specify whether the task is an event or a task.</p> <p>Although an event is still treated as a task in regards to duration, start and finish time, an event is classified as a meeting or an approval of item(s). Specifying events gives the schedule manager the ability to better manage the schedule by identifying when work is actually being done versus a decision making or approval process that may or may not impact the schedule.</p>	Optional
Master Task Name	<p>Map this field to its corresponding column in the Excel spreadsheet.</p>	Optional

e-Builder Field Name/ Import File Column Header	Description	Required/Optional
	<p>Master tasks are created by the account administrator and used to identify similar project phases that may be referred to by different names across multiple projects.</p> <p>Example</p> <p>One project might use the term, 'Closeout' and others may use 'Final Completion', 'Project Close Out' or 'Closeout/Occupancy'.</p> <p>The master task is a unique identifier that unifies all of these project phases so that account administrators and Executives can report on the status of these phases across all projects. All master tasks have a numerical prefix that allows you to link similar project phases to one another.</p> <p>A subtask will not likely be tied to a master task, only the primary project phase or Summary Task, such as Pre-Design, Design, Construction or Closeout.</p>	
Master Task Number	Map this field to its corresponding column in the Excel spreadsheet.	Optional
Task Resource Role	<p>Map this field to its corresponding column in the Excel spreadsheet.</p> <p>This column includes the name of the e-Builder role the task resource belongs to.</p>	Optional
Task Resource	<p>Map this field to its corresponding column in the Excel spreadsheet.</p> <p>This column includes the name of the task resource.</p>	Optional
Task Manager	Map this field to its corresponding column in	Optional

e-Builder Field Name/ Import File Column Header	Description	Required/Optional
Role	the Excel spreadsheet. This column includes the name of the e-Builder role the task resource belongs to.	
Task Manager	Map this field to its corresponding column in the Excel spreadsheet. This column includes the name of the task manager.	Optional
Predecessors	Map this field to its corresponding column in the Excel spreadsheet. This column includes task number and constraint type of predecessor tasks. For example, 6FF.	Optional

To import a schedule for multiple projects

1. Open the Schedule page.
2. In the Quick Links section, click **Import Tasks**.




Note: If the Import Tasks link is not available, contact your e-Builder Technical Support to enable this option.

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

Export Schedules


Schedules can be exported to an XML file, which can be opened in Microsoft Project. The XML export is ideal for schedule managers who track their schedules using both e-Builder and MS Project. Schedules can also be exported into a PDF, which is useful for printing.

To export the schedule as an XML file

1. Open the Schedule page.
2. In the **Actions** section of the toolbar, click  **Export**.
3. Select XML.

The schedule is exported as an XML file.

To export the schedule as a PDF

1. Open the Schedule page.
2. In the **Actions** section of the toolbar, click  **Export**.
3. Select PDF.
4. Review the print settings and click **Print**.

The schedule can now be printed or saved as a PDF.

Manage Schedule Tasks

You can perform the following actions on tasks:

Add Individual Tasks

In most cases, tasks can be imported using Microsoft Project. However, if you have permission to create tasks, you can add tasks to the schedule one at a time.

To add individual tasks

1. Open the Schedule page.
2. In the **Tasks** section of the toolbar, click **Add Task**.
The task is added to the bottom of the schedule
3. Edit the task inline.
4. Click **Save**.

Note: To edit a task's details, double-click on the task to open it in the Task Editor.

To add an individual task from the list of tasks

1. Open the Schedule page.
2. Right click on a task where you would like to add your new task.
3. Select **Add** from the drop down, and then choose where you wish to add the new task.
The task is added and ready for inline editing.
4. Click **Save**.

Activate Schedule Tasks

After tasks have been added to the schedule via an import, they are in draft status until activated. Note that project participants can still view draft tasks.

To activate tasks

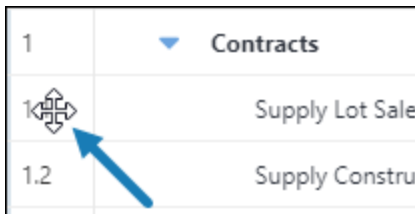
1. Open the Schedule page.
2. Right-click on the tasks you want to activate and select **Activate**.



Move Tasks

Tasks can be moved within the schedule to update either the sequence or WBS.

To move tasks within a schedule

1. Select the task you wish to move by clicking on the task's number.



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

Update Tasks

Tasks can be updated by modifying details such as title, dates and duration. You can also reassign, activate or complete multiple tasks at a time.

To update a single task using inline editing

1. Open the Schedule page.
2. Click on the task you wish to edit.

The input fields become editable.



3. Make all necessary changes.

Note: Task durations can also be modified by selecting the right side of the Gantt bar for the related task and moving it left or right to decrease or increase the task duration.

4. Click **Save**.

To update multiple tasks

1. Open the Schedule page.
2. Click and hold the fill handle in the bottom right corner of the cell that contains the value.
3. Drag the fill handle to select the cells that you want to contain the same value.

Supply Construction Agreement	1 day	12.01.2018
Supply Contract Plans	1 day	12.01.2018
Supply Contract Specifications	1 day	12.01.2018
Supply Contract Site Plan	3 days	12.04.2018
Secure Financing	3 days	12.04.2018

4. Click **Save**.

To update tasks using the Task Editor

1. Open the Schedule page.
2. Right-click on the task and select **Task Details**.
The Task Editor dialog is displayed.
3. Make all necessary changes.
4. Click **OK**.

If approval is required for date changes or percent complete, a message displays informing you that an approval request was sent to the Task Manager. Click **Continue**.

Note: For a description on each of the fields, see Task Editor.

Assigning Resources to a Task

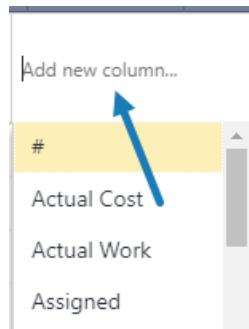
This feature is available only if you have the Resource Management feature enabled.

To assign tasks

1. Open the Schedule page.
2. Click the **Assigned Resources** column next to the task you want to assign a resource to.

Tip

If the **Assigned Resources** column is not visible, click **Add new column** and select the new column.



A dialog with a list of resources is displayed.

3. Select the check box(es) of the resources to be assigned to the task.
4. For each of the selected resources, select their role, the percentage of work that the resource's time is assigned to a task, and the total work hours.
5. Click **Close**.

Mark Tasks Complete

Users with access to the project schedule can mark tasks as complete. Marking tasks complete is equivalent to updating the percent complete to 100.

To mark tasks as complete

1. Open the Schedule page.
2. Right-click on the task and select **100% Complete**.
3. Click **Save**.

To mark tasks as using the Task Editor

When marking a task as complete, you can also provide additional details.

1. Open the Schedule page.
2. Right-click on the task and select **Task Details**.
The Task Editor dialog is displayed.
3. On the **General** tab, set **% complete** to 100.
4. Enter additional details.
5. Click **OK**.
6. Click **Save**.

Delete Tasks

If a task becomes obsolete, delete it from the schedule.

To delete tasks

1. Open the Schedule page.
2. Right-click on the task and select **Delete**.

3. Click **Delete**.

Note: Tasks that are linked to the cash flow cannot be deleted. If these associations exist, these tasks will be listed and you will only be able to cancel this action.

4. Click **Save**.

Manage Calendars

This feature is available in the New Schedule interface. Accounts with Resource Management (RM) or Resource Management with Costs (RMC) include the ability to manage calendars by default. Administrators can contact Support and request to activate the Multiple Calendars feature.

Use the Manage Calendars to set the calendars for this schedule. Three standard calendars are available: 24 hours, 7 Day week and Standard. You can edit their working time or create new calendars.

To access the Manage Calendars dialog box

1. Open the Schedule page.
2. On the **Tasks** tab, in the **Calendars** section of the toolbar, click  Working Time.

To add a new calendar

1. On the **Manage Calendars** dialog box, under the **Calendar** section, click **Add**.
2. Enter a name for the new calendar.
3. Select to either make a copy of an existing calendar or select to add a new calendar.
4. Click **Add**.
The new calendar is added.
5. Select the calendar to edit it.
6. To make it the default calendar, select the **Default Calendar** check box.
7. To edit the working time:
 - a. Click **Edit Working Time**.
 - b. Select the working days.
 - c. Click on the working hours to edit them or click **Add** to add new hours.
 - d. Click **OK**.
8. To add non-working days as exceptions to your calendar:
 - a. In the **Exceptions** section, click **Add**.
 - b. Enter a descriptive name for the exception.
 - c. Select whether it is a working or non-working type of exception.
 - d. Edit the Start and Finish dates to define a date range.
 - e. To add a single day, select the date on the calendar and then click **Add**.
 - f. To remove an exception, select the exception row and click **Remove**.
9. Click **Apply** to save your changes.

To remove a calendar

1. On the **Manage Calendars** dialog box, under the **Calendar** section, select the calendar to remove.
2. Click **Remove**.

Manage Templates

Schedule templates are created by users with Manage Template permission. Schedule templates give the schedule manager a blueprint for starting the project schedule. Typically, the schedule manager applies the template at the onset of planning out the schedule. Templates can include very little or a gamut of task information. Using templates is highly recommended to help you save time when building out the schedule and keep you in sync with your account administrator.

After the schedule has been finalized, users with Manage Templates permission can save it as an account-wide or personal template. Account templates are accessible to everyone in all projects. Your personal templates are tied to your username and are available in any project that you have access to.

Note: Constraints are not saved to schedule templates.

To save a schedule as a template


1. Open the Schedule page.
2. In the **Tasks** section of the toolbar, click  **Templates**.
3. Click **Save as Template**.
4. Enter a name for the template in the **Name** field.
5. Next to **Template Type**, choose whether to save the template as an account or personal template.

Note: Schedule Managers or users with Manage Template permissions are able to make this template available throughout the account and anyone with access is able to save it as a personal template. Account templates will be available in all projects for all users to access. Personal templates are tied to your username and will be available in any project that you have access to by going to Setup > My Settings > Schedule > My Schedule Templates.

Tip: The Duration indicates the amount of time it will take to complete all tasks on the template schedule.

6. Click **Save**.

To apply a template

1. Open the Schedule page.
2. On the **Tasks** tab, in the schedule toolbar, click  **Templates**.
3. Click the drop-down arrow to choose the template you want to apply.
4. On the **Apply Template** page, do the following:
 - a. Choose a place in the current schedule to add the tasks in the template. Template tasks can be added to the end of the schedule, or in between other tasks by choosing one of the placement options.
 - b. Choose what to do with duplicate calendars.

- c. If you chose to copy and rename the existing calendar, you can preview the duplicate calendar in the Manage Calendars dialog box.

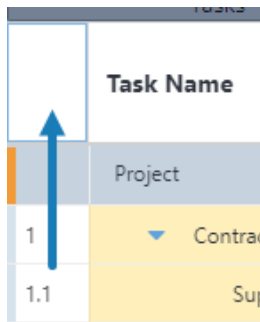
5. Click **Apply**.

Manage Schedule Baseline

The baseline is the planned, ideal roadmap for the project schedule. In order to give you a point of reference for measuring deviations to the baseline, a baseline should be saved after the schedule has been finalized but before the project gets underway. You can baseline the entire schedule at one time or subsets of the schedule as they are completed, such as the design tasks, construction tasks, or close-out tasks. Baselines can only be saved after the task(s) has been activated. A snapshot is automatically created upon saving the baseline.

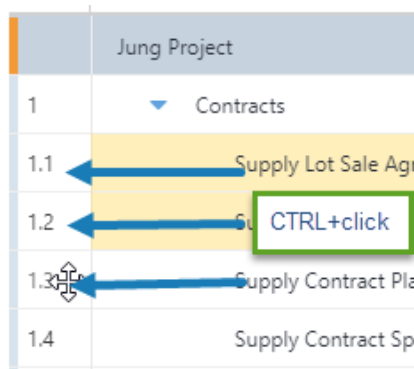
To save a schedule baseline

1. Open the Schedule page.
2. To save a baseline of the entire schedule, select the header of the number column.



—Or—

To save the baseline of just a few tasks, press CTRL and click the number column of the tasks you wish to include.



3. In the **Baseline** section of the toolbar, click **Set**.
The Set Baseline dialog is displayed.
4. Select either to set a baseline for the entire project or only the selected tasks.
5. Click **OK**.

To reset a baseline

1. After a baseline has already been set, in the **Baseline** section of the toolbar, click **Reset**.
—Or—
Right-click on the tasks you wish to reset and select **Reset Baseline**.
2. In the **Reset Baseline** dialog, choose to either set the baseline for the entire project or the selected tasks.
3. When prompted to confirm, click **OK**.

Manage Schedule Snapshots

Taking a snapshot of your schedule allows you to track progress.

Save snapshot

Snapshots should be saved periodically. In most cases, schedule managers save a snapshot of the schedule at least once a month but they can be taken at any point in the project and used to review the progress of the schedule at different points in time.

To save a snapshot of the schedule

1. Open the Schedule page.
2. In the **Actions** section of the toolbar, click **Snapshot**.
3. On the **Save Snapshot** dialog, enter a name for the snapshot, such as the date or project phase.
4. Click **Save**.

View snapshot

After taking a snapshot of your schedule, you can view a list of all snapshots on the Snapshots tab.

To view saved snapshots

1. Open the Schedule page.
2. Click on the **Snapshots** tab.
3. Click to view a saved snapshots.

A snapshot of the schedule opens on a separate tab.

Compare snapshots

The Compare Snapshots page gives Schedule Managers a way to see the difference in task duration, start and finish dates or percent complete in one or more snapshots. This page lists all tasks in a collapsible view, with each selected snapshot nested underneath the task so you can see if there have been any changes over time. The current schedule is also listed in the list of snapshots to support real-time analysis. Changes appear in red text. If a snapshot entry is missing from any of the tasks, it's because the task was not included in the schedule at the time the snapshot was taken.

To compare snapshots

1. Open the Schedule page.
2. Click the **Snapshots** tab.
3. Select the check box next to the snapshots you want to compare.

Note: If only a single snapshot is selected, it will be compared to the current schedule.

4. Click **Compare**.

The Compare Snapshot dialog displays a comparison of the two snapshots.

Note: Changes in snapshots are displayed in red.

Field Description

A description of the fields are described below:

Compare snapshots

- **Snapshot Name:** Lists the name of the task first as a collapsible header. The names of the snapshots are listed beneath the task name.
- **Duration:** The task durations, which is the amount of time allotted for the completion of the task.
- **Start:** The actual start date of the task
- **Finish:** The actual finish date of the task.
- **% Complete:** The percentage complete of the task.

Deleted Tasks

- **Snapshot Name:** The name of the most recent snapshot the deleted item was last saved in.
- **#:** Task number
- **Task name:** The name of the task
- **Duration:** The amount of time allocated for the task's completion.
- **Start:** The date the task was started or schedule to begin, if it had not yet began.
- **Finish:** The date the task was finished or schedule to finish, if it had not yet been completed.
- **% Complete:** The task's percentage complete before it was deleted.

Predecessor and Successor Tasks

Tasks can be either linked together or dependent on one another. The tasks involved in these interdependent relationships are either predecessor or successor tasks. Predecessor tasks come first and successor tasks follow. Predecessor tasks refer to tasks that must be completed or at least begin before another task can start. Successor tasks are those that follow the predecessor. Schedule managers have the ability to specify what must be done and by when to ensure a successful project outcome. For example, the Schedule Manager can designate that one task can only begin 20 days after a previous task is completed.

Link types are used to establish the relationship between these dependencies and they are as follows:

Finish to Start (FS) - Task 2 cannot start until task 1 finishes

Finish to Finish (FF) - Task 2 cannot finish until task 1 finishes

Start to Start (SS) - Task 2 cannot start until task 1 starts

Start to Finish (SF) - Task 2 cannot finish until task 1 starts

If predecessors are not defined in the import file or they need to be updated on the fly, schedule managers can do so by editing the individual task. You are able to define up to five predecessor tasks for an individual task record.

To define predecessor tasks

1. Open the Schedule page.
2. Right-click on the task that you want to define predecessors for and select **Task Details**.
The Task Editor dialog is displayed.
3. Click the **Predecessors** tab.
4. To add a predecessor task, click **Add New**.
5. In the new row, select the task that you want to add as a predecessor.
6. In the **Lag** column, enter the amount of time in days, weeks or months that this task must endure before the subsequent task, or the task you've selected can begin or end.
7. In the **Type** column, select one of the following options:
 - Finish to Start (FS) - Select this option if task 2 cannot start until task 1 finishes
 - Start to Start (SS) - Select this option if task 2 cannot start until task 1 starts
 - Finish to Finish (FF) - Select this option if task 2 cannot finish until task 1 finishes
 - Start to Finish (SF) - Select this option if task 2 cannot start until task 1 finishes
8. Click **OK** to save your changes.

To add new predecessor tasks

1. Open the Schedule page.
2. Right-click on the task that you want to add a new predecessor for.
3. Select **Add > Predecessor**.
4. Enter additional task information inline.
5. Click **Save**.

Schedule Mode

The Scheduling Mode choice will dictate how e-Builder will calculate either the task's Duration or Work, or a resource's Units.

When you see the following words, interpret them as:

- **Fixed:** Set by a User
- **Duration:** Days
- **Work:** Hours
- **Units:** % of a Resource's Work Day that are assigned to a task

Fixed Duration mode (default)

The work of the task will change when a user assigns or removes resources.

User Changes	Duration	Task Work	Units
Start	user changed	recalculate	unchanged
Finish	user changed	recalculate	unchanged
Duration	user changed	recalculate	unchanged
Task Calendar	unchanged	unchanged	unchanged
Add/Remove Assignment	unchanged	recalculate	user changed
Assignment %	unchanged	recalculate	user changed

Fixed Work mode

The duration of the task will change when a user assigns or removes resources. Also known as “Effort Driven” mode in some scheduling software.

User Changes	Duration	Task Work	Units
Start	unchanged	unchanged	unchanged
Task Calendar	unchanged	unchanged	unchanged
Add/Remove Assignment	recalculate	unchanged	unchanged
Assignment %	recalculate	unchanged	user changed
Task Work	recalculate	user changed	unchanged

Fixed Duration and Task Work mode

The Units (Resource allocation %) will change when a user assigns or removes resources.

User Changes	Duration	Task Work	Units	Assignment Work
Start	user changed	unchanged	recalculate	unchanged
Finish	user changed	unchanged	recalculate	unchanged
Duration	user changed	unchanged	recalculate	unchanged
Task Calendar	user changed	unchanged	recalculate	unchanged
Add/Remove Assignment	unchanged	recalculate	recalculate	user changed
Resource Work	unchanged	recalculate	recalculate	user changed

Resource and Manager Roles

For accounts that do not have Resource Management (RM) or Resource Management with Cost (RMC), a Resource Role is automatically created on project schedules.

Resource Roles

Note: The Resource Role has no relationship to e-Builder's Account-level roles or e-Builder Project-level roles. It only applies to the Schedule module.

The resource user and any other user on the project who is in the same role as the "Resource Role" can perform the following actions:

Task Edits

The resource user and any other user on the project who is in the same role as the Resource Role can perform the following actions on tasks where their role is the Resource Role:

- Edits on the General tab of the Task Editor:
 - Change the task's **% Complete** value (between 0% and 100% complete)
 - Change the task's **Duration** (which will automatically update the task's **Finish** date from the task's **Start** date).
 - Change the task's **Start** date (which will automatically update the task's **Finish** date using the task **Duration**).
- Edits on the Advanced tab of the Task Editor:
 - Change the **Constraint Type** and the **Constraint Date** (which will automatically update the task's start and finish date to align with the constraint selected).
 - Mark the Task as a Milestone (which will automatically change the task's **Duration** to 0 days and adjust the task's start and finish dates to equal each other).
- Add comments on the Comments tab of the Task Editor.

For more information, see the Task Editor Page Overview.

Schedule UI Toolbar Actions

The resource user can perform the following actions from the toolbar:

- Export the Schedule in XML or PDF format (for printing)
- Send the Schedule via e-mail to other users or external users
- Toggle the Critical Path on and off on the Gantt chart
- Toggle the Baseline bars on and off on the Gantt chart
- View the Calendar from the Working Time icon.

For more information, see the Toolbar Buttons section on the Schedule Details Page.

Project Schedule View Edits

- The resource user can add new columns and hide existing columns from their View of the Project Schedule.

Snapshots and Schedule History

- The resource user can view Snapshots from the Snapshots tab.
- The resource user can view the Schedule History from the History tab.

Manager Roles

In addition to the tasks granted to Resource Roles, users in the Manager Roles can change the following fields on a task:

- Change the Resource Role and Resource User assigned to tasks
- Change the Task Name on their tasks
- Change the Predecessor relationships for their tasks
- Change the Master Task association for their tasks

Task Editor

Use this page to include every task detail, such as notes, documents, forms and processes.

To update tasks using the Task Editor

1. Open the Schedule page.
2. Right-click on the task and select **Task Details**.
The Task Editor dialog is displayed.
3. Make all necessary changes.
4. Click **OK**.

If approval is required for date changes or percent complete, a message displays informing you that an approval request was sent to the Task Manager. Click **Continue**.

A description of each of the fields are listed below:

General

- **Name:** Task name
- **Description:** A brief description of the task
- **% Complete:** The completion percentage of the task.
- **Duration:** The duration of the task.
Note: If the Schedule Mode (under Advanced tab) is set to 'Fixed Work', the duration automatically adjusts the number of days based on the resource's units (i.e., % Allocation)
- **Dates Start:** The task start date.
- **Dates Finish:** The task finish date.
- **Baseline Start:** If baseline was saved, this field displays the start date of this task as it was saved in the baseline.
- **Baseline Finish:** If baseline was saved, this field displays the finish date of this task as it was saved in the baseline.
- **Baseline % Complete:** If baseline was saved, this field displays the finish date of this task as it was saved in the baseline.

- **Baseline Status:** The status of the baseline.

Predecessors

- **Add New:** Click to add a new predecessor.
- **Task Name:** Select the task to add as a predecessor.
- **Type:** Select the type of relationship.
- **Lag:** Select the time frame for when this new task or additional predecessor tasks can begin or end.

Resources (with RM or RMC)

The following options are available if your account has Resource Management (RM) or Resource Management and Cost (RMC) enabled.

- **Add New:** Click to add a new resource.
- **Resource Name:** Name of the resource.
- **Role:** The role assigned to the current resource for the specific task. For a list of actions available to the resource role, see [Resource and Manager Roles](#) .
- **Units:** The percentage of how much of the resource's availability that is dedicated to this task.
- **Work:** The number of hours the resource is dedicated to this task. This value auto-adjusts after you change the units.

Note: If the Scheduling Mode (under the Advanced tab) is set to 'Fixed Work', the resource's work is not editable.

Resources (without RM or RMC)

The following fields are available if your account does NOT have Resource Management (RM) or Resource Management and Cost (RMC) enabled.

- **Resource Role:** Select the role that will have permission to update the task. All members of this role will inherit the permission.
- **Resource - Responsible Resource:** Select the user who will be the main point of contact. This user has to be a member of the selected resource role. For a list of actions available to all users of the selected resource role, see [Resource and Manager Roles](#) .
- **Manager Role:** Select the role that will have permission to update the task. All members of this role will inherit the permission.
- **Manager - Responsible Resource:** Select the manager who will be the main point of contact. This user has to be a member of the selected resource role. For a list of actions available to all users of the selected manager role, see [Resource and Manager Roles](#)

Advanced

- **Calendar:** Select from the available project calendars.
- **Constraint Type:** Select the type of constraint to be applied to a task.
- **Constraint Date:** Select the date that is desired to coincide with the constraint type. To remove a constraint, you must first change the Constraint Type to "None".
- **WBS Code:** The WBS code of the task

- **Rollup:** When selected, indicates the task will rollup to the parent tasks
- **Manually Scheduled:** When enabled, it allows users to change a task's dates manually and ignore schedule dependencies. To enable it, click on the cell and select the check box.
- **Critical:** Indicates that a task is on the critical path (longest path) for the project schedule
- **Milestone:** Indicates whether the task is a zero duration milestone.
- **Auto-adjust uncompleted:** When selected, it moves a milestone to its next available calendar date if the start date for the milestone is in the past and the milestone is 0% complete.

Example:

A Committee Meeting is set to re-occur on the first Monday of the month. This meeting did not take place on the 1st Monday of February and was at 0% complete. When the schedule is loaded the next day, it automatically adjusts the meeting date to the 1st Monday of March.

- **Master Task:** Select the master task.
- **Master Process:** Select the master process.
- **Scheduling Mode:** Select the schedule mode.

Comments

- **Add Comment:** Type task-related comments and click **Add**.
- **Check Spelling:** Checks the spelling of the comment and provides suggestions.
- **Request Comment:** Select the user who you wish to receive a comment on the selected task.

Custom Fields

Displays any configured custom field for the selected task.

Tasks Page Overview

The Tasks page starts off as a blank canvas. You can pick the items you would like to see on this page by creating custom views. If you have access to multiple projects, the Tasks page gives you a program-wide view of task details.

ExampleSchedule and task managers can create a view of all the tasks they manage whose percent complete is greater than 50 %. This would allow managers to focus in on just those items that are near completion or most critical to them.

The following tabs are available:

- **Task list:** Lists all the tasks in the projects that you have access to. Click each task to view it in the Task Editor.
- **Week:** Lists the tasks that are scheduled for the selected week.
- **Month:** Lists the tasks that are scheduled for the selected month.

To access the schedule Tasks page

- On the top navigation tabs, click the **Schedule** tab. The Tasks page is displayed.

To open a project's schedule

- From the Tasks page, select the project from the 'All Project's drop-down list on the top-right. The (Create) Schedule page is displayed.

About the Submittal Module

The Submittal module helps the project team actively manage the full submittal process, confirming that the contractor's planned work on the job site will meet the designer's intentions as detailed in the project specifications. This module has streamlined the process to make it easy for subcontractors, general contractors (GC), submittal coordinators and design reviewers to collaborate within a single system.

E-Builder's submittal coordinator position can be assigned to various roles, often an architect/ engineer or the owner's project manager. The flexibility of the submittal coordinator position enables them to grant responsibility to the correct team members based on each project's contractual requirements.

Both e-Builder licensed and non-licensed participants can be engaged in the submittal process and still work directly in the e-Builder system. The full team has access to the module appropriate to their needs in order to obtain status updates, view audit trails and identify bottlenecks at any phase of the project.

Ball-in-Court Mechanism

Like most e-Builder modules, Submittals utilizes the 'ball-in-court' mechanism to keep participants abreast of items awaiting their response. Automated email notifications alert participants when action is needed on their part.

To support cross-functional visibility, a clearly defined 'Held By' column is displayed for each Submittal Item visible on the Home page, and this data is available for inclusion in reports. The 'Held By' field lists all participants whose court the item is currently in.

Process Management

When general contractors and subcontractors add items to the submittal register, they can describe and manage the project's submittals with standard and custom fields, target due dates, item statuses, actual dates and more.

These details provide many benefits for the management team.

- The GC is able to streamline the process early on and put controls in place (due dates) to reduce lag and encourage accountability.
- Contractors and submittal coordinators can track response times from the design team to ensure prompt responses and address unnecessary delays.
- They can also identify which packages are late and who's holding the process up to proactively address potential bottlenecks.

Throughout every phase of the submittal process, the submittal module facilitates the exchange of information, tracks transactions, and provides real-time visibility into the status of each submittal item. Submittal reports based on the logs provide real-time visibility and an opportunity to identify problem areas early on to mitigate potential risks.

The Submittal Workflow

The diagrams below are a high-level view of the submittal workflow and its key players. These workflows illustrate the permission structure that allows both the general contractor and submittal coordinator to engage external participants while maintaining control and visibility of the entire process.

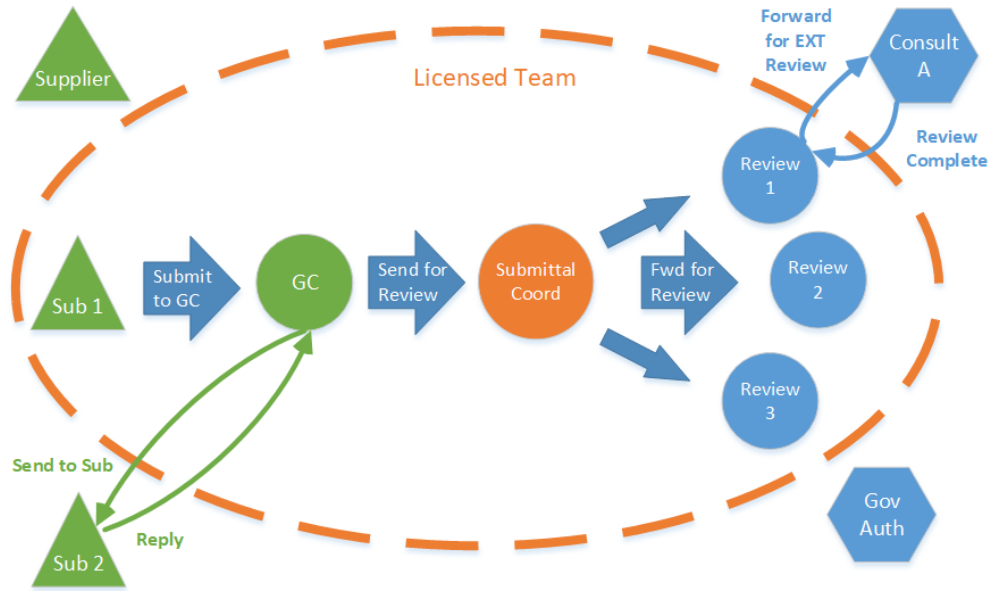


Image 1 - Forward flow of submittals

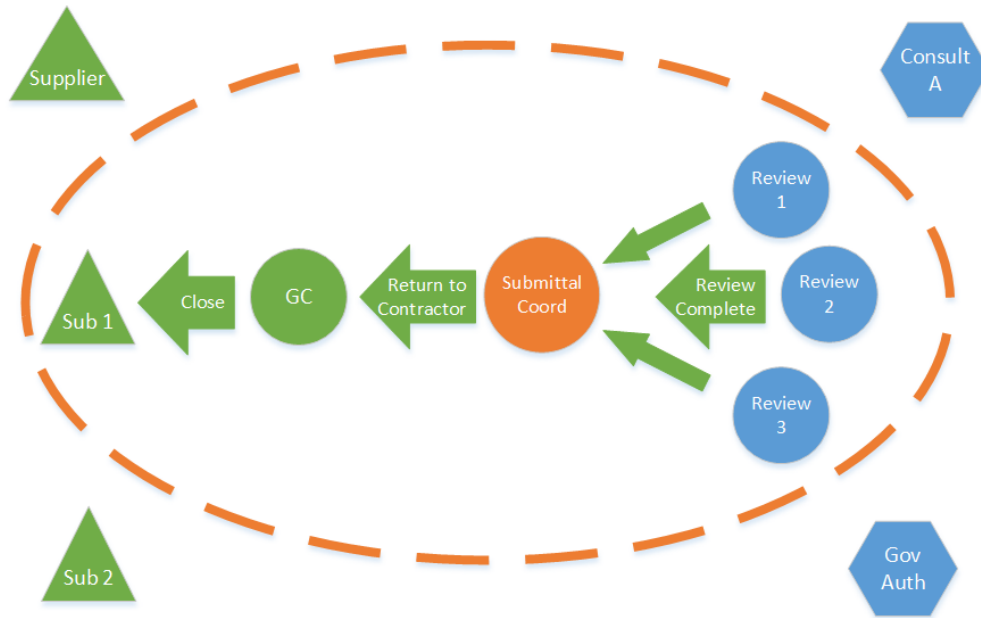


Image 2 - Return flow of submittals

Access Submittals

The Submittal module provides access to project-specific submittals.

To access the Submittal module

1. On the Home page, click the **All Projects** drop-down menu to select a project.
2. In the Project Menu on the left navigation pane, click the **Submittals** link.

Note: If the submittal settings for the project have been configured already, the Submittal Register page is displayed. Otherwise the Submittal Settings page is displayed.

To access the Submittal Register page

1. On the Home page, click the **All Projects** drop-down menu to select a project.
2. In the Project Menu on the left navigation pane, click the **Submittals** link.

Note: If submittal settings have not been completed, the Submittal Settings page is displayed; otherwise, clicking Submittals from the Project Menu will open the Submittal Register page. For instructions on configuring submittal settings, see Complete Submittal Settings.

To access the Submittal Item Details page

1. On the Home page, click the **All Projects** drop-down menu to select a project.
2. In the Project Menu on the left navigation pane, click the **Submittals** link.
3. Click the title of a submittal item to view its details. The Submittal Item Details page is displayed for the selected item.

To access the Submittal Packages page

1. On the Home page, click the **All Projects** drop-down menu to select a project.
2. In the Project Menu on the left navigation pane, click the **Submittals** link.
3. From the Project Menu, click **Submittal Packages**.

To access the Submittal Package Details page

1. On the Home page, click the **All Projects** drop-down menu to select a project.
2. In the Project Menu on the left navigation pane, click the **Submittals** link.
3. From the Project Menu, click **Submittal Packages**.
4. Click the title of a submittal package to view its details. The Submittal Package Details page is displayed for the selected package.

Submittal Register Page

The Submittal Register page allows all participants of the submittal process to access submittal items and take the appropriate actions. The action buttons are permissions based, and therefore may not be available to all team members.

From the Submittal Register page you can take any of the following general actions:

- **Filter Submittal Items:** The top portion of this page is a filter that allows you to narrow the list of submittals you are viewing by a wide range of criteria.
- **View Filtered Submittal Items:** The table located in the lower portion of the page lists all available submittal items or the results of your filtered criteria.

Note: When the View draft submittals account-level setting is enabled, all team members who have the View Submittals permission will be able to see Submittal Register Items that are in Draft status.

From the Submittal Register page, the following role-specific actions can be taken to complete the submittal process:

- General Contractor Tasks
- Subcontractor Tasks
- Submittal Contractor Tasks
- Reviewer Tasks

To access the Submittal Register page

- Open the Submittal module.

Note: If submittal settings have not been completed, the Submittal Settings page is displayed; otherwise, clicking Submittals from the Project Menu will open the Submittal Register page. For instructions on configuring submittal settings, see Complete Submittal Settings.

Filter Submittal Items

The Filter Submittal Items section allows you to narrow down the results list to just the submittal items you need to view. This filter can be collapsed to increase screen real estate, and then expanded if necessary, by clicking the expand / collapse button in the upper-left corner of the page.

A description of the fields and buttons located in this section is provided below:




Filter Submittal Items

- **Search In:** Select one of the following options to specify the search criteria.
 - **All:** Select this option to filter for all submittal items.
 - **Pending my review:** Select this option to search for only those submittal items that are pending your review. This is the default display if there is at least one item requiring your approval within the selected project.
- **Title:** Enter the title of a specific submittal item to filter by.
- **Status:** From the drop-down list, choose a specific submittal status to filter by.
- **Number:** Enter a specific submittal item number to filter by.
- **Revision:** Enter a specific submittal item revision number to filter by.
- **Submittal Package #:** Enter a submittal package number to filter by items located in a specific page. You can filter on any part of the package number.
- **Responsible Sub/ Manufacturer:** Enter the name of a sub-consultant or manufacturer to filter by.
- **Item Status:** Select one or more of the following options to filter by submittal item status.
 - **Open:** Select this option to filter for open submittal items, which are those that have been added to a submittal package.
 - **Closed:** Select this option to filter by closed submittal items.
 - **Draft:** Select this option to filter by draft submittal items.
 - **Overdue:** Select this option to filter by overdue submittal items.

- **Description:** Enter text included in the description of a specific item(s) to filter by.
- **Category:** From the drop-down list, select a specific category of submittal items to filter by.
- **Priority:** From the drop-down list, select a specific priority of items to filter by.
- **Spec Section:** Enter the spec section to filter by. The spec section refers to a section number in the specifications which itemizes the details of that section; such as Masonry, for example. This is usually based on the CSI division.
- **Sub Section:** Enter the sub section to filter by. The sub section refers to the subsection number of the specifications which itemizes the details of that section. This is usually based on the CSI division and its spec section.
- **Reviewer:** Enter the name of a specific review to filter by items reviewed by a particular person.
- **Clear:** Click this button to clear the filters.
- **Filter:** Click this button to filter by the entered criteria.

View Filtered Submittal Items

A description of the fields and buttons located in this section is provided below:

- **Priority Icons:** If applicable, this column displays the status of each item. Below is a description of each item:
 -  High Priority
 -  Low Priority
- **Item Details:** The paper clip and comment icons give you the options to view existing attachments and comments and add new ones. The calendar icon appears for general contractors (users with Add/Edit Submittal permissions). Click the calendar icon to view and modify submittal date details.
- **Title:** Displays the title of the submittal item. Click to open the Submittal Item Details page. If available, the description icon appears () - click to view a description of the item as entered by the general contractor.
- **#:** Displays the submittal item number.
- **Rev #:** Displays the submittal item's revision number.
- **Package #:** Displays the submittal package number that the items belongs to. If a number does not display, the item has not yet been added to a package.
- **Spec Section:** Displays the spec section number. The spec section refers to a section number in the specifications which itemizes the details of that section; such as Masonry, for example. This is usually based on the CSI division.
- **Sub Section:** Displays the sub section number. The sub section refers to the subsection number of the specifications which itemizes the details of that section. This is usually based on the CSI division and its spec section.
- **Category:** Displays the category that the submittal item belongs to.
- **Status:** Displays the status of the item as assigned by the submittal coordinator. Submittal statuses and prefixes are customizable by account administrators, therefore available statuses may vary. Below

is a description of the default statuses, which may or may not be used by your particular account:

- App - Approved
- AAN - Approved as Noted
- FRO - For Record Only
- ONH - On Hold
- REJ - Rejected
- REV - Revise
- RAR -Revise & Resubmit
- **Submittal Coordinator:** Displays the name of the submittal coordinator.
- **Held By:** Displays the name of the person(s) who the item is currently in the court of.
 - **General Contractor and Subcontractors:** If the item was sent to a subcontractor, their name or email address (if an external subcontractor) will appear in this field. Internal subcontractors are able to send items to other subcontractors. If this occurs, and neither of these users have taken action on the item, both of their names will appear in this field.
 - **Submittal Coordinator and Reviewers:** If the item was sent for review by the submittal coordinator to one or more reviewers, the name or email address (if an external reviewer) of those reviewers will appear in this field, as long as they have not yet taken action on the item.
- **Reviewers:** A Reviewers link appears in this column when the item has been forwarded for review by the submittal coordinator or sub-consultants. Click this link to view a list of all reviewers of the item and if applicable, when their reviews were completed.

General Contractor Tasks

A General Contractor can take the following actions from the Submittal Register page:

- Add Items
- Send Individual Items for Review
- Send Items to Subcontractors
- Add Items to Submittal Package
- Delete Submittal Items
- Import Submittal Register
- Close Submittals
- Revise Submittals

As a general contractor, you should have Add/Edit Submittal permissions, which will give you the ability to take the actions implied by each of command buttons listed below.

General Contractor Action Buttons

- **Send for Review:** Click to send select items to the submittal coordinator for review. You can send an entire submittal package for review or the individual items of the package.

Note: Submittal items must be part of a submittal package before they can be sent to the submittal coordinator for review.

Sending individual items for review allows you to get the review process underway if all items that

belong to the package are not yet ready to be reviewed. For instructions, see Send Individual Items for Review. When a submitter (General Contractor) clicks the **Send for Review** button on the Items tab of the Submittal Package Details page, the submittal item status will change from "NEW" to "In Review".

- **Send to Sub:** Click to send select items to a subcontractor. Subcontractors will receive an email notification with the details of the item(s). Both licensed and non-licensed e-Builder subcontractors will be able to respond, make comments and attach documents to the item(s), however, only licensed subcontractors will be able to send the item to another subcontractor for review. A history log of the item's trail is accessible from the submittal item's History tab.
The subcontractor's name or email address (depending on whether they have an e-Builder user-name or not) will be placed in the Held By field on the Submittal Register page. When the subcontractor responds, the Held By field will be updated with the general contractor's name as the item will effectively be back in the GC's court. For instructions, see Send Items to Subcontractors.
- **Add to Package:** Click to add select items to a new or existing submittal package. Only new status submittal items can be added to a package. For instructions, see Add Items to Submittal Package.
- **Add Item:** Click to add an individual submittal item. Typically, the submittal log is imported at the onset, but it may be necessary to update the register with individual submittal items as the need arises. For instructions, see Add Individual Submittal Items.
- **Delete:** Click to delete select items. Only draft items now associated to a package can be deleted. For instructions, see Delete Submittal Items.
- **Import:** Click to import submittal items. The submittal register is typically imported by the general contractor at the start of the submittal process, but additional items via import whenever necessary. Additionally imported items will be appended onto the existing list of submittal items. For instructions, see Import Submittal Register.

Setup Tasks

Typically, the general contractor (GC) is responsible for setting up the Submittal module independent of the account settings. After account configurations are completed, it is the GC's obligation to complete a set of preliminary tasks before the submittal review processes can get underway. These tasks are as follows:

- Complete Submittal Settings
- Assign Submittal Coordinator
- Import Submittal Register

Complete Submittal Settings

About Project Submittal Settings

For the purpose of the Submittal module, the General Contractor (GC) function is determined by the Add/ Edit Submittal permission. This permission must be assigned in the Setup module to a specific GC user role by an account administrator.

Once the add / edit permission has been assigned, users within that role have access to the project-level Submittal Settings page. The intention of giving the GC settings access is to allow the GC to manage much of the submittal process on individual projects independently from the owner's organization. Because the Submittal Settings can alter the workflow of the submittal reviews, the role(s) that are granted the add / edit permission should be carefully planned by the project team.

Note: Account administrators can also access the project Submittal Settings.

Complete the Project Submittal Settings

Verifying the project submittal settings is a necessary first step for general contractors when using the Submittal module. The Submittal Settings is the first page to display when accessing this module for the first time on a project, which gives you the opportunity to set the framework for how the submittal process will work for this particular project.

Many of the Submittal Settings are established as defaults at the account level by the administrator, but can be modified for each project's specific requirements. Project Submittal Settings can be edited at any time during the project.

Assigning a submittal coordinator for the project is required and very important. For details, see Assign Submittal Coordinator.

To complete submittal settings

1. Open the Submittal module.
2. From the Project Menu, click **Settings**.
The Submittal Settings page is displayed.
3. Complete all necessary fields.

Note: For a description of each field, see Submittal Settings Page Overview.

4. Click **Save**.

Assign Submittal Coordinator

The submittal coordinator role is the central traffic cop for the submittal review process and is often filled by the architect/ engineer on the project. If the project owner is directly involved in managing the submittals, this role may be assigned to the facilities project manager within the owner's organization. In any case, this assignment can vary depending on each project's team structure and contractual needs.

Projects can have multiple submittal coordinators, but each submittal item is assigned to a single submittal coordinator individual. Submittal coordinators are able to manage each other's submittal items in the event of an absence.

The General Contractor is responsible for assigning a submittal coordinator. This step is typically done as part of setting up the Submittals module for each project, along with completing other submittal settings.

Note: Submittal coordinators must be licensed e-Builder users with View Submittal permissions. The submittal coordinator does not typically have other submittal permissions unless they will also be performing functions normally handled by the subcontractors or general contractors.

Tip

e-Builder recommends assigning at least two submittal coordinators per project to avoid bottlenecks.

To assign a submittal coordinator

1. Open the Submittal module.
2. From the Project Menu, click **Settings**.
The Submittal Settings page is displayed.
3. In the **Submittal Coordinator** field, click the **Select From** drop-down arrow to narrow down the list of users to select from or choose **All Roles**.
4. Select the user and then click the right directional arrow to add the user to the adjacent box.
5. Click **Save**.

Tip

If you do not see the needed user in the selection list, verify with your e-Builder Administrator that the user meets all of the criteria below:

- User is a member of the project
- User is a member of the selected role
- User has view submittal permissions

Related Topics:

- Submittal Settings Page Overview

Import a Submittal Register

The submittal register is typically imported into e-Builder by the general contractor (with Add/ Edit Submittals permission) at the start of the submittal process. Imports can also be performed by subcontractors with the Create Submittal permission.

While submittal items can be added one at a time, the Excel file Import function allows you to save time by importing items in bulk. The import file can include as much or as little detail about the submittal items as necessary. If available, custom fields can also be imported.

Submittal Register Import File Requirements

- Supported import file types include .xls and .xlsx.
- Header row values in the import file:
 - The import file must have a defined header row for a successful import (highlighted in the image below).

	B	C	D	E	F	G	H
	Spec Section	Title	Category	Date Due From Sub	Submit for Review	Review Complete	Return Date Due
2	02120	OG Water Retention System/Storm Drain	Mock Up	11/9/2009	11/7/2009	11/17/2009	11/19/2009
3	02730	Precast/Field Erected Masonry Manhole(s)	Product Data	11/6/2009	11/8/2009	11/18/2009	11/20/2009
4	02730	Corrugated Drainage Pipe	Sample	11/7/2009	11/9/2009	11/19/2009	11/21/2009
5	02200	Soil Nail Drawings	Shop Drawing	11/8/2009	11/10/2009	11/20/2009	11/22/2009
6	02200	F&W Temporary Shoring w/Calcs	Mock Up	11/9/2009	11/11/2009	11/21/2009	11/23/2009
7	02268	Sanitary Drainage /Water Piping/Specialties	Product Data	11/10/2009	11/12/2009	11/22/2009	11/24/2009
8	02268	Meter for Water Piping	Sample	11/11/2009	11/13/2009	11/23/2009	11/25/2009

- If the header row in the import file is identical to the e-Builder field names, these fields will be automatically populated, otherwise, you will have to click the drop-down arrows to map the columns in the import file to those in e-Builder.

Example

The following image is of the Field Mappings page that is displayed after the file is uploaded. The left column lists the built-in e-Builder fields. The right column (with the drop-down menus) are the column names of the imported Excel spreadsheet. If the header row in the import file is identical to the e-Builder field names, these fields will be automatically populated, otherwise, you will have to click the drop-down arrows to map the columns in the import file to those in e-Builder.

To import the submittal register

1. Go to the Submittal Register page. For access instructions, see Access Submittals.
2. Click **Import**.

3. Click **Choose File** to search for and select the import file.
4. Click **Next**. The Field Mapping page is displayed showing the mapping between your Microsoft Excel[®] columns and the e-Builder fields.
5. If the columns in your file are the same as the columns in e-Builder, they will populate automatically. If not, select the corresponding fields from the adjacent drop-down menus.
6. Click **Next**. The Review page is displayed showing a preview of the import and any exceptions determined.
7. If there were errors, review them on the **Exceptions** tab, make necessary changes, and then click **Previous** to re-import the spreadsheet. Repeat this procedure from step 3.

—Or—

If all rows have imported correctly, click **Import**. A import confirmation notification is displayed.

8. Click **Finish**.

Related Topics:

- Add a Single Submittal Item
- Access the Submittal Module

Add Individual Submittal Items

Submittal items can be added one-at-a-time, or if you have a list of the items prepared, you can import the Register using an Excel spreadsheet. If the package has already been created, the item can also be added by following the procedure below.

To add submittal items

1. Go to the Submittal Register page. For access instructions, see Access Submittals.
2. Click **Add Item**.

3. Complete all required fields.
4. Click **Save**.

Related Topics:

- Import Submittal Register
- Access Submittal Module
- Submittal Register Page Overview

Add Individual Submittal Items

Submittal items can be added one-at-a-time, or if you have a list of the items prepared, you can import the Register using an Excel spreadsheet. If the package has already been created, the item can also be added by following the procedure below.

To add submittal items

1. Go to the Submittal Register page. For access instructions, see Access Submittals.
2. Click **Add Item**.

3. Complete all required fields.
4. Click **Save**.

Related Topics:

- Import Submittal Register
- Access Submittal Module
- Submittal Register Page Overview

Edit Submittal Details

Note: A submittal item's details can be edited only if it has not already been sent to a submittal coordinator for review.

General contractors or anyone with add/ edit submittal permissions have the ability to make changes to the details of a submittal item except for target and actual dates, unless the account administrator has enabled this feature on the Submittal Settings page in the Setup module. See Allow Editing of System-Generated Dates for more detail.

To edit the details of a submittal item

1. Go to the Submittal Register page. For access instructions, see Access Submittals.
2. Click the title of the item you want to edit. The Submittal Item Details page is displayed.
3. Click **Edit**. The Edit Submittal Item page is displayed.
4. Modify the values in the following editable fields as required:
 - Title
 - Description
 - Spec Section
 - Category
 - Responsible Sub/ Manufacturer
 - Priority
 - Sub Section
 - Commitment
5. Click **Save**.

Related Topics:

- Add/ Edit Submittal Item Page Overview

Delete Submittal Items

Submittal items can be deleted by general contractors or anyone with add/ edit submittal permissions.

Note: Only draft submittal items not associated to a package can be deleted. To delete an item in a package, which has not yet been sent for review, remove the item from the package first, and then delete it.

To delete submittal items

1. Go to the Submittal Register page. For access instructions, see Access Submittals.
2. Select the check box next to the item(s) you want to delete.
3. Click **Delete**.
4. When prompted to confirm, click **OK**.

Send Items to Subcontractor

e-Builder has two primary methods of starting the review of a submittal item.

Note: Only items that have not yet been forwarded for review to the submittal coordinator can be sent to a subcontractor (Send to Sub).

Send to Sub

In this method, the GC establishes the project submittal register of planned submittals. The GC periodically requests submittal documentation from the assigned subcontractor as subcontracts are awarded using the **Send to Sub** action. The GC selects submittal items from the submittal register to **Send to Sub**. Items do not have to be in a package at this point. The subcontractor receives an email notification with the details of the item, including any attachments.

Create / Submit to GC

In this method, subcontractors(with Create Submittal permissions) are directly participating in the submittal process, and are creating all or some of the submittal register items instead of the GC. The subcontractor uses the **Create** action, attaches documentation, and uses the **Submit to GC** action to start the review process.

In this scenario, the **Send to Sub** action is not typically used as part of the review initiation. See Submit Items to GC.

Note: The Send to Sub action may also be used at the end of the review cycle for the GC to return a final submittal to the subcontractor. See Return Items to Subcontractor for more details.

Licensed and non-licensed e-Builder subcontractors who receive a Send to Sub item can add comments and attach documents to the submittal. Additionally, licensed subcontractors can in turn use the Send to Sub action to forward an item to a next tier subcontractor.

The subcontractor's name or email address appears in the Held By column on the Submittal Register page. When the subcontractor responds, the Held By field will be updated with the GC's name and the item returns to the GC's court.

To send submittal items to a subcontractor

1. Go to the Submittal Register page. For access instructions, see Access Submittals.
2. Select the check box next to the items you want to send to the subcontractor.
3. Click **Send to Sub**. The Send Items to Sub dialog box is displayed.

Note: For a description of the fields on this page, see Send Items to Sub Page Overview.

4. Enter all necessary fields.

Tip

When emailing an external user that is also an e-Builder contact, use your keyboard to auto-fill the desired email address. Begin typing the recipient's name or email address, then use the arrows to highlight the email of choice, and then click **Tab** to make the selection.

5. Click **Send to Sub**.

Update Submittal Item Dates

While entering submittal items into the system, either via import or individually, the general contractor will include the due dates and if applicable, the actual date details for the items. These details may change as the submittal process proceeds.

It's important to be accurate about these dates, as reports can be run for these details to help the administrative team identify potential bottlenecks.

To update the dates for submittal items

1. Open the Submittal Item Details page.
2. Select the items for which you want to make date changes.
3. Click **Update Dates**.
4. Make the necessary changes.
5. Click **Save**.



Attach Documents to Submittals

In IE 10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise.

To attach documents to submittals

1. Go to the Submittal Register page.
For instructions on how to access the Submittal Register page, see [Access Submittals](#).
2. In the Item Details section, click the paper clip icon for the submittal item to which you want to attach the document(s).

The Attached Documents - [Submittal Item Name] window appears.

<input type="checkbox"/>	Item Details	Title	#	Rev #
<input type="checkbox"/>		Landscaping	1	0
<input type="checkbox"/>		Rebar Shop	2	0

3. Click **Add**. The Attach File window is displayed.
4. Select how you wish to attach the file.

Tip: You can either add files from your computer to the e-Builder Documents module and then attach them, or attach an existing file from the Documents module.

- Click **Upload from your Computer** to browse for files on your computer.
 - i. Search for and select the e-Builder **Destination Folder** for the attachment. Click **Select**.
 - ii. Drag and drop the file from your machine or click **Browse** to search for and select it.
 - iii. Add a description for the file(s) being uploaded. Click **Finish**.
- Click **Select from Documents Module** to attach files from e-Builder.
 - i. Select a file to attach from the left navigation pane. The selected files will be displayed on the right pane.

- ii. Select the check box beside the file name on the right pane. Click **Attach**.
5. If document custom fields are enabled on the account, the Document Custom Fields page is displayed. Complete all the necessary fields, and then click **Close**.
6. *Optional:* Optionally, you can take any of the following actions:
 - Click the **Download** link to download the file.
 - For PDF and image files, click the **Redline** link to mark up the file.
 - For PDF documents, click the **Stamp** link to add a stamp to the file.

Related Topics:

- [Submittal Register Page Overview](#)

Create Submittal Packages

A submittal package is a collection of submittal items grouped together by the contractor to expedite the approval process. Individual submittal items cannot be sent to the submittal coordinator, only submittal packages can be exchanged between the general contractor and the submittal coordinator; however, if you discover that additional items need to be sent to the coordinator after the package has been sent, you can edit the package to include those items. If one item needs a response faster than the other items, it is recommended to send that item in its own package. The submittal coordinator should review and update the status of all items before submitting the package back to the contractor.

To create a submittal package

1. Go to the Submittal Packages page. For access instructions, see [Access Submittals](#).
2. Click **Create Package**.
The Create Submittal Package page is displayed.
3. Enter all necessary fields.

Tip

When selecting the CSI Division, if you enter the first couple of numbers it will bring you down to that section.

4. Click **Save**.
The Submittal Package Details page is displayed.
5. Click **Add Items**.
The Add To Package submenu displays.
6. Make one of the selections below, and then click **Add**.
 - Add existing items:
 - a. The Add Items dialog box appears. Select the check box next to the item(s) you wish to add to the package.
 - b. Click **Add to Package**.
 - c. A confirmation dialog box appears. Click **OK**.
 - Add New items:

- a. The **Add Submittal Item** page appears.
- b. Enter all required fields.
- c. Click **Save**.

Create Submittal Packages

A submittal package is a collection of submittal items grouped together by the contractor to expedite the approval process. Individual submittal items cannot be sent to the submittal coordinator, only submittal packages can be exchanged between the general contractor and the submittal coordinator; however, if you discover that additional items need to be sent to the coordinator after the package has been sent, you can edit the package to include those items. If one item needs a response faster than the other items, it is recommended to send that item in its own package. The submittal coordinator should review and update the status of all items before submitting the package back to the contractor.

To create a submittal package

1. Go to the Submittal Packages page. For access instructions, see Access Submittals.
2. Click **Create Package**.
The Create Submittal Package page is displayed.
3. Enter all necessary fields.

Tip

When selecting the CSI Division, if you enter the first couple of numbers it will bring you down to that section.

4. Click **Save**.
The Submittal Package Details page is displayed.
5. Click **Add Items**.
The Add To Package submenu displays.
6. Make one of the selections below, and then click **Add**.
 - Add existing items:
 - a. The Add Items dialog box appears. Select the check box next to the item(s) you wish to add to the package.
 - b. Click **Add to Package**.
 - c. A confirmation dialog box appears. Click **OK**.
 - Add New items:
 - a. The **Add Submittal Item** page appears.
 - b. Enter all required fields.
 - c. Click **Save**.

Add Items to Submittal Packages

The general contractor will typically add items to a package after they've been reviewed by subcontractors; however, if you choose, you can add items to a package without a subcontractor's review. After items are added to a package, they can then be sent to the submittal coordinator for review.

To add items to a submittal package

1. Go to the Submittal Register page.

For instructions, see Access Submittals.

2. Select the check box next to the item(s) you want to add.

Note: Only draft items can be added to a package, which are those items that have not yet been updated by the submittal coordinator.

3. Click **Add to Package**. The **Add To Package** submenu displays and presents the two options listed below.

4. To items to a new package, select the **Create new submittal package** radio button.

The Add Submittal Package page is displayed.

—Or—

To add items to an existing submittal package, select the **Select existing submittal package** radio button.

Note: If the setting, Allow items to be added after review starts is NOT enabled, you will not be able to select an existing package that includes items which have already been sent for review. See Submittal Settings Page Overview for details.

5. Click **Continue**. This ends the task if you are adding to an existing package. Otherwise, go to the next step.
6. Enter all necessary fields.
7. Click **Save**.

Related Topics:

- Submittal Register Page Overview

Generate Transmittals

A transmittal is a word document that summarizes the details of a submittal package. The name of the package, and a list of all submittal items the package is comprised of are listed in a transmittal. Details for each submittal item are also included such as item numbers, categories, statuses, and notes. If submittal mail merge template(s) have been assigned to the project, the transmittal will automatically render according to the template on file. If more than one template it assigned to the project you will be prompted to make a choice.

A transmittal can be used in a number of ways. They are often used as a cover sheet when sending hard copy materials to the submittal coordinator. Optionally, a transmittal can also be attached to a submittal package before it's sent to the submittal coordinator to maintain a paper trail of physical materials.

To generate a transmittal

1. Go to the Submittal module.

For instructions, see Access the Submittal Module.

2. From the Project Menu, click **Submittal Packages**.
3. Select a package.

4. Click **Generate Transmittal**.
5. If more than one Submittal mail merge templates is assigned to the project, you will be prompted to make a choice. Click the drop-down list and make a selection.

Related Topics:

- Submittal Package Details Page Overview
- Submittal Mail Merge Templates

Remove Items from Submittal Package

Team members may need to remove individual items from a submittal package that were incorrectly added.

You may remove items ONLY if the following conditions apply:

- The package is NOT in Closed status
- The package is NOT in Approved status
- The individual item is NOT approved
- The individual item has NOT been sent for review
- The individual item MUST reside in a package that is the most recent revision.

To remove items from a submittal package

1. Go to the Submittal Packages page. For access instructions, see Access Submittals.
2. Select the package that you want to modify. The Submittal Package Details page displays.
3. Select the check box next to the item(s) you want to remove.
4. Click **Remove Items**. You are prompted for confirmation.
5. Click **OK**.

Related Topics:

- Submittal Package Page Overview
- Submittal Package Details Page Overview

Send Submittal Package for Review

Sending the package for review places it in the submittal coordinator's court. General contractors can send either the entire submittal package for review or just the individual items of the package.

To send a submittal package for review

1. Go to the Submittal Packages page. For access instructions, see Access Submittals.
2. Select the check box next to the package you want to send.
3. Click **Send for Review**.
The Send for review dialog box displays.
4. Enter all necessary fields.
5. Click **Send for Review**.

Related Topics:

- Send Individual Items for Review
- Submittal Package Page Overview
- Submittal Package Details Overview
- Send for Review Page Overview

Send Individual Items for Review

After items have been added to a submittal package, the general contractor can send either the entire submittal package for review or just the individual items of the package. Sending individual items allow you to get the review process underway if all items that belong to the package are not yet ready to be reviewed.

To send individual packaged items for review

1. Go to the Submittal Packages page. For access instructions, see Access Submittals.
2. Select the package that includes the items you want to send.
The Submittal Package Details page displays.
3. Select the check box next to the item(s) you want to send.
4. Click **Send for Review**. The item status will change to "In Review".

Return Item to Subcontractor

After the design review process is completed, the submittal coordinator will return the final reviewed submittal with attachments and comments to the general contractor (Add/Edit Submittal permissions).

At this point, subcontractors with access to e-Builder will be able to view the final reviewed submittals returned by the submittal coordinator. However, to ensure that the subcontractors realize that the submittal has been returned, the GC may want to use the **Send to Sub** action to send a notification.

Additionally, if the subcontractor has Create Submittal rights, the GC may use the **Send to Sub** with an Action Required to request that the subcontractor create a revision for resubmittals.

Tip: GCs can use the Send to Sub action on open items that they are holding. If you are regularly notifying subcontractors of reviewed items, be sure the submittal register statuses are not using Auto-Close and bypassing the GC.

To return submittal items to the subcontractor

1. Go to the Submittal Packages page. For access instructions, see Access Submittals.
2. Click the package title. The Submittal Package Details page displays.
3. Select the item(s) to be returned.
4. Click **Send to Sub** and complete the form.
 - Select **Notify** send type to simply let the subcontractor know that a submittal has been completed.
 - Select **Action Required** send type for subcontractors with Create permission to ensure they create a revision and resubmittal. Identify a due date for the revision to be created.
5. Click **Save**.

Related Topics:

Send Items to Sub Page Overview

Revise and Resubmit Submittal Item

If the status of an item is revise and resubmit, the contractor must create a revision to the package to resubmit the items that have been requested. Once a revision has been created, the revised item(s) will automatically become their own package. When a revision package is created, the last number in the package number is updated to reflect the number of revisions to that package.

To review and resubmit submittal items

1. Go to the Submittal Packages page. For access instructions, see [Access Submittals](#).
2. Click the package title.
The Submittal Package Details page displays.
3. Select the item(s) to be revised.
4. Click **Create Revision**.
5. Click **Save**.
The Submittal Package Details page displays.
6. *Optional:* You can attachment documents by clicking the **Attach** link located on the results table.
7. Start the submittal process over again.

Related Topics:

- [Add Attachments](#)
- [Submittal Package Details Overview](#)

Close Submittal Packages

If there are items that have been reviewed by the submittal coordinator and no additional revisions are needed, the contractor can close the item if they agree with the response. The contractor should create revisions for all items that need to be revised before closing out the completed items.

Note: If the setting Honor Auto-Close Status is enabled, then submittal items will automatically be placed in Closed status when the item is set to a specific status, which is predefined by the account administrator. This is an account and project-level setting. For more information, see [Submittal Register Options \(Account Setting\)](#) and [Submittal Settings Page Overview \(Project Setting\)](#)

1. Go to the Submittal Packages page. For access instructions, see [Access Submittals](#).
2. Select the package whose details you wish to view.
The Submittal Package Details page is displayed.
3. Click **Close**.
You are prompted for confirmation.
4. Click **Continue**.

Related Topics:

- [Submittal Package Details Overview](#)

Subcontractor Tasks

A subcontractor can take the following actions from the Submittal Register page:

- Add Items
- Add Items to Submittal Package
- Delete Submittal Items
- Import Submittal Register
- Send Items to Another Subcontractor
- Reply to Submittal Items
- Close Submittals
- Revise Submittals

e-Builder licensed subcontractors with View Submittal permissions can take the actions implied by each of command buttons listed below. Users with this permission setting are able to see all submittal items, even if they are not assigned to them. Non e-Builder-licensed subcontractors have the same privileges except for the ability to send items to another subcontractor.

Subcontractor Action buttons

- **Send to Sub:** This button appears only for e-Builder licensed subcontractors. Click to send the submittal item to another subcontractor for review. This will effectively update the Held By field with the name or email address of the recipient; indicating that the item is now in their court. For instructions, see Send Items to Another Subcontractor.
- **Reply:** Click to reply to the submittal item review request. This option only allows you to send a message, but if necessary you can also attach documents to the submittal item and add comments. For instructions on replying, see Reply to Submittal Items.

Working with Submittal Items

e-Builder has two primary methods of starting the review of a submittal item:

1. **Send to Sub:** The GC establishes the project submittal register of planned submittals. The GC periodically requests submittal documentation from the assigned subcontractor as subcontracts are awarded using the **Send to Sub** action. See Send Items to Subcontractor.
2. **Create / Submit to GC:** Subcontractors are directly participating in the submittal process, and creating all or some of the submittal register items instead of the GC. The subcontractor uses the Create action, attaches documentation, and uses the **Submit to GC** action to start the review process.

Subcontractors with Create Submittal permission can work with submittal items in a similar manner as general contractors with **Add/Edit Submittal** permission.

Subcontractors can only view draft submittal items that they created themselves, or that the GC has sent to them. If the GC creates a comprehensive register for the whole project (scenario 1 above), subcontractors will not be able to view these items until the GC requests documentation with the **Send to Sub** action.

All submittals must route through the GC using the **Submit to GC** action, and cannot be sent directly from the subcontractor to the submittal coordinator or design team.

To work with submittal items, see the following pages:

- Add Individual Submittal Items
- Edit Submittal Details
- Delete Submittal Items
- Attach Documents to Submittals
- Submit Items to GC
- Add Comments to Submittal Items
- Reply to Submittal Item
- Send Items to another Subcontractor

Related Topics:

- Import Submittal Register
- Access the Submittal Module
- Submittal Register Page Overview

Submit Items to GC

After the subcontractor creates submittal items and attaches the documentation to be reviewed, the subcontractor can use the **Submit to GC** action to start the review process. The submittal items do not have to be in a package at this point.

The GC's name appears in the **Held By** column on the Submittal Register page, and in the GC's court until the item is forwarded to the submittal coordinator for review.

To submit submittal items to a GC

1. Go to the Submittal Register page.
For instructions, see [Access Submittal Register Page](#).
2. Select the check box next to the item(s) you want to send to the GC.
3. Click **Submit to GC**.

The Submit to GC dialog box displays.

Note: For a description of the fields on this page, see [Submit to GC Page Overview](#).

4. Enter all necessary fields.

Note: The General Contractor drop down list will contain a list of individuals for selection to receive the submittal item. If no names appear in the list, then the GC or project administrator needs to identify the GC role that will manage submittals in the project submittal settings page.

5. Click **Submit to GC**.

Add Comments to Submittal Items

Users with View rights can add comments to a submittal item. Once they send the item to another resource, they can no longer add comments.

Example: Submittal coordinators typically add comments and attachments while reviewing items between themselves and their reviewers. Once they send the item to the GC, they can no longer add comments.

Note: If the Hide Comments and Attachments feature is enabled on the account, comments and associated attachments will be hidden from the GC by default. To make individual comments visible, click the corresponding "Show" link. If a "Show" link does not appear, it's an indication that this feature is not set and all comments and attachments will be visible to the GC.

To add comments to a submittal item

1. Open the Submittal Item Details page.
2. Click the **Comments** tab, and then **Add Comments**.
The Add Comments page is displayed.
3. Enter comments.
4. Optionally, you can attach documents to your comments by clicking **Attach Documents**.
5. Click **Save**.

Related Topics:

- Redline Submittal Documents
- Stamp Submittal Documents
- Reply to Submittal Items
- Send Items to another Subcontractor

Reply to Submittal Item

Replying to the submittal item will send a message to the person that sent you the submittal item; this may be the general contractor or another subcontractor. After replying, your name will be removed from the Held By column and the item will no longer be in your court.

Tip: For more information on how reviewers can mark a review as complete, see Mark Reviews Complete.

To reply to submittal items

1. Open the Submittal Item Details page.
2. Click **Reply**.
The Reply Submittal Items dialog box displays.
3. Enter a comment.
4. If this option is available to you, select or clear the **Private** check box to make your comment either private or public.

Note: The Private Comments feature can be enabled by account administrators. This feature allows only users in select roles to view and add private comments. For more information, see Manage Private Comments.

5. Click **Reply**.

Related Topics:

- Redline Submittal Documents
- Stamp Submittal Documents
- Send Items to another Subcontractor
- Mark reviews complete

Send Items to another Subcontractor

Note: Only licensed e-Builder subcontractors are able to send items to another subcontractor.

You may need to send items to another sub for a second opinion or to solicit additional information. When the recipient replies, the message will be sent directly to you. A log of this action will be captured on the submittal item history tab. Additionally, the recipient's name or email address (for external subcontractors) will be added to the Held By column on the Submittal Register page, indicating that the item is currently in their court as well. When they reply, their name will be removed from this column, but will remain on the list of reviewers.

To send an item to another subcontractor

1. Go to the Submittal Register page. For access instructions, see Access Submittals.
2. Select the check box next to the item(s) you want to send to sub.
3. Click **Send to Sub**.
The Send Items to Sub page displays.
4. Complete all necessary fields.
5. Click **Send to Sub**.

Related Topics:

- Send Items to Sub Page Overview

Attach Documents to Submittal Items

You are able to attach files to a submittal item as long it is in your court. Once the item is sent off to another resource, you will not be able to add or edit attachment, but you will still be able to view any files that might be attached to the item.

Tip

In IE 10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise.

To attach documents to a submittal item

1. Open the Submittal Item Details page.
2. Click the **Documents** tab, and then **Attach Documents**.
The Attach Documents dialog box appears.
3. In the **Select Attachment Method** section, select your method of attachment.
4. Click **Browse For Files...**
5. Search for and select the file you want to attach.

6. If you are attaching files from e-Builder, go to step 9.

—Or—

If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.

Note: Selecting a destination folder is only applicable if a default folder is not already assigned.

7. Search for and select the e-Builder destination folder.
8. Click **Attach Selected**.
9. If document custom fields are enabled on the account, the Document Custom Fields page is displayed. Complete all necessary fields, and then click **Close**.
10. Optionally, you can take any of the following actions:
 - Click the **Download** link to download the file.
 - For PDF and image files, click the **Redline** link to mark up the file.
 - For PDF documents, click the **Stamp** link to add a stamp to the file.

Related Topics:

- Redline Submittal Documents
- Stamp Submittal Documents
- Add Comments to Submittal Documents
- Reply to Submittal Items
- Send Items to another Subcontractor

Working with Submittal Packages

Subcontractors with **Create Submittal** permission can create submittal packages in a similar manner as the general contractors with **Add/Edit Submittal** permission.

After the subcontractor creates submittal packages, the subcontractor can then use the **Submit to GC** action to start the review process. All submittals must route through the GC, and cannot be sent directly from the subcontractor to the submittal coordinator or design team.

To work with submittal packages, see the following pages:

- Create Submittal Packages
- Add Items to Submittal Packages
- Remove Items from Submittal Package
- Submit Packages to GC

Related Topics:

- Submittal Package Page Overview

Submit Packages to GC

Subcontractors can optionally create submittal packages, and then submit to the GC.

[To submit submittal packages to a GC](#)

1. Go to the Submittal Packages page. For access instructions, see Access Submittals.
2. Select the check box next to the packages you want to submit to the GC.
3. Click **Submit to GC**.

The Submit to GC dialog box displays.

Note: For a description of the fields on this page, see Submit to GC.

4. Enter all necessary fields.

Note: The General Contractor drop-down list will contain a list of individuals for selection to receive the submittal item. If no names appear in the list, then the GC or project administrator needs to identify the GC role that will manage submittals in the project submittal settings page.

5. Click **Submit to GC**.

Submittal Coordinator Tasks

A Submittal Coordinator can take the following actions from the Submittal Register page:

- Forward Items to Design Reviewers
- Update Submittal Statuses

Tip: Usually, submittal coordinators being members of the Design team, cannot close out submittals. However, Admins can give Submittal Coordinators the Add/ Edit permission in addition to the Submittal Coordinator designation. With these additional permissions, they will be able to perform the following actions:

- Manage the design review team with the Forward for Review action
- View all “hidden” comments & attachments, and determine which ones are shown to the construction team
- Make final determination of submittal status and use the Return to Contractor action
- Close the submittal. (Must return it to the contractor first as a separate action.)

A description of the fields and buttons located on the Submittal Register page is provided below:

Submittal Coordinator Action Buttons

- **Update Status:** Click to update the status of select items. This option is primarily used to update multiple items with the same status. To update individual items, click the drop-down arrow in the Status column. For instructions, see Update Status for Multiple Items.
- **Forward for Review:** Click to forward select items to sub-consultants for review. e-Builder licensed sub-consultants have the ability to forward items to other subs as well. When this occurs, the Held By field will be populated with the name or email addresses of all reviewers that have not yet taken action on the item.

Click the Reviewers link to see a list of all sub-consultants that have reviewed the item, the date the item was forwarded and if available, the date that the review was completed.

The Held By column will list the Submittal Coordinator's name when there are no longer any reviews pending. For instructions, see Forward Items to Sub-Consultants for Review.

Forward Items for Review

After items are received from the general contractor, the submittal coordinators will be able to forward those items to their sub-consultants for review. Multiple items can be forwarded at a time. e-Builder-licensed reviewers have the ability to forward items to other subs as well.

Note: There are two types of forwards. You can forward to simply notify the recipient of the item or require action from them. Notifying is simply an FYI because the item is not placed in their court. Requiring action places the item in the recipient's court.

To see a list of everyone who the item was sent to, click the "Reviewers" link on the Submittal Register page. The reviewers whose court the item is in (meaning those who have not yet responded to the review request) will be listed in the "Held By" column on the Submittal Register page. The item will not be back in your court until all reviews are complete. However, you will still be able to send items back to the GC, even if all reviewers do not provide a response.

Submittal Coordinator	Held By	Reviewers
Randy Smith	Randy Smith	Reviewers
<input type="checkbox"/> Randy Smith	Randy Smith	Reviewers

To forward items for review

1. Go to the Submittal Register page. For access instructions, see Access Submittals.
2. Select the check box next to the item(s) you want to forward.
3. Click **Forward for Review**.
The Forward for Review window appears.
4. Complete all necessary fields.

Note: In the **Send Type** field, you can select whether to forward the item as a notification or require action from the recipient. The Action Required option will place the item in their court. Notify, is more like a CC or an FYI. This option is typically accompanied by a message.

5. Click **Forward for Review**.

Related Topics:

- Submittal Register Page Overview
- Submittal Item Details Page Overview

Add Comments to Submittal Items

Users with View rights can add comments to a submittal item. Once they send the item to another resource, they can no longer add comments.

Example: Submittal coordinators typically add comments and attachments while reviewing items between themselves and their reviewers. Once they send the item to the GC, they can no longer add comments.

Note: If the Hide Comments and Attachments feature is enabled on the account, comments and associated attachments will be hidden from the GC by default. To make individual comments visible, click the corresponding "Show" link. If a "Show" link does not appear, it's an indication that this feature is not set and all comments and attachments will be visible to the GC.

To add comments to a submittal item

1. Open the Submittal Item Details page.
2. Click the **Comments** tab, and then **Add Comments**.
The Add Comments page is displayed.
3. Enter comments.
4. Optionally, you can attach documents to your comments by clicking **Attach Documents**.
5. Click **Save**.

Related Topics:

- Redline Submittal Documents
- Stamp Submittal Documents
- Reply to Submittal Items
- Send Items to another Subcontractor

Update Status of Multiple Items

Submittal statuses can only be updated by the submittal coordinator. When updating the status for multiple items, only one status can be selected.

To update the status of multiple submittal items

1. Go to the Submittal Register page.
For instructions on how to access the Submittal Register page, see Access Submittals.
2. Select the check box next to the submittal items you want to update.
Note: Select only those items that will be updated with the same status.
3. Click **Update Status**. The Update Status dialog box displays.
4. Click the **New Status** drop-down arrow to select the status you want to update the items to.
5. Enter a comment.
6. If the option is available to you, select or clear the **Private** check box to make your comment either private or public.

Note: The Private Comments feature can be enabled by account administrators. This feature allows only users in select role to view and add private comments. For more information, see Manage Private Comments.

7. Click **Save**.

Related Topics:

- Submittal Package Details Overview

Update Status of Individual Item

After reviews are returned to the submittal coordinator, he/ she will update the status of each item accordingly. You can update multiple statuses at a time, or each item individually, as outlined below.

Note: You can continue your review (update status or send to contractor) even if a response is not received for your reviewers.

To update the status of an individual item

1. Go to the Submittal Register page. For access instructions, see Access Submittals.
2. Click the Status drop-down arrow next to the item you want to update.
The Update Status dialog box appears.
3. Enter a comment in the **Comment** field.
4. If the option is available to you, select or clear the **Private** check box to make your comment either private or public.

Note: The Private Comments feature can be enabled by account administrators. This feature allows only users in select roles to view and add private comments.

5. If the option is available to you, click **Show all in Review** to make these comments visible to the GC, otherwise all comments will be hidden from review.

Note:

- If the Hide Comment and Attachments feature is enabled on your account, by default, all the comments made between yourself and reviewers will be hidden from the GC when items are sent for review. However, you can make all comments visible by clicking the **Show all in Review** button or make individual comments visible by clicking the "Show" link next to that comment.
- If a note is marked private, but shown in review, the GC will only be able to see it if they are in a role that allows them to view private comments. Administrators can learn more about these settings by going to Submittal Settings.

6. Click **Save**.

Show/ Hide Comments from Review

This task is only applicable to submittal coordinators who are working in an account where the Hide Comment and Attachments setting is enabled. When this setting is enabled, comments and files attached to comments are hidden from the GC by default when sent for review. However, you have the option to show these comments and their associated attachments in bulk or individually.

If the **Changes Private comments to Public (visible) when shown in review** setting is turned on and if the Submittal Coordinator enables the shown in review setting, private comments will be switched to public comments.

To show/ hide comments

1. Open the Submittal Item Details page.
2. To show/ hide comments, click the **Comments** tab.
3. To show all comments in review, click **Show all in Review**.

—Or—

To show/ hide comments individually, click the **Show** or **Hide** link next to each comment, respectively.

4. Click **Update Status**.

Related Topics:

- Submittal Item Details Page Overview

Send Items to Contractor

Individual items can be sent back to the contractor as they are completed. If responses have not been received from reviewers, this will not restrict you from completing the review and sending the item back to the contractor. If the item is completed, it will be in your court and the reviewer's court.

To send submittal packages to the contractor

1. Go to the Submittal Packages page. For access instructions, see Access Submittals.
2. Select the package that includes the item(s) you want to send.
The Submittal Package Details page is displayed.
3. Select the check box next to the item(s) you want to send
4. Click **Send to Contractor**. The Send to Contractor window is displayed with the following fields:
 - **Project:** Name of the project.
 - **Title:** Title of the package.
 - **Send To*:** The name of the person to whom the items are to be sent.
 - **CC Roles:** Select the roles to which you want to send the items as a CC message.
 - **CC Users:** Select the users to whom you want to send the items as a CC message.
 - **CC External Users Via Email:** You have the ability to request comments from external project participants who may not have e-Builder access. Enter their e-mail addresses (one per line) in this box.
 - **Select folder for external user to attach files:** If you allow external users to attach files with their comment, select a folder that recipient's files will be loaded into.
 - **Message:** Enter a message to accompany the request for comments.
 - **Private:** If this option is available to you, select or clear the **Private** check box to make your comment either private or public.

Note: The Private Comments feature can be enabled by account administrators. This feature allows only users in select roles to view and add private comments. For more information, see Manage Private Comments.

5. Click **Send to Contractor**.

Related Topics:

- Submittal Package Page Overview
- Submittal Package Details Overview

Reviewer Tasks

A reviewer can take the following actions from the Submittal Register page:

- Forward Items to Other Sub-Consultants for Review
- Complete Review of Submittal Items
- Add Comments
- Stamp Submittal Documents
- Redline Submittal Documents

Note: Only e-Builder licensed reviewers are able to forward items for review.

Reviewer Action Buttons

A description of the fields and buttons located on this page is provided below:

- **Forward for Review:** Click to forward select items to another sub-consultant for review. Your name and the name of the recipient(s) will display in the Held By field until action is taken on the item. Your names will remain available from the Reviewers link with a time stamp of what the review was completed. For instructions, see Forward Items to Other Sub-Consultants for Review.
- **Review Complete:** Click to complete your review of the item(s). Your name will be removed from the Held By column and the date the item was marked reviewed will be available from the Reviewers link. For instructions, see Complete Review of Submittal Items.

Forward Items to Other Reviewers

Only e-Builder-licensed reviewers are able to forward items to other reviewers. External reviewers (those that do not have an e-Builder license) are not able to do so.

Note: There are two types of forwards. You can forward to simply notify the recipient of the item or require action from them. Notifying is simply an FYI because the item is not placed in their court. Requiring action places the item in the recipient's court.

When an item is forwarded, it is effectively in the recipients courts and their name(s) or email addresses (external reviewers) will appear in the "Held By" column on the Submittal Register page. When recipients reply or mark their review complete, their name will be removed from this column. Also, all replies are sent to the person who forwarded the item, not necessarily to the submittal coordinator. For example, if a design consultant forwards the item to an external consultant for additional information, when the external party replies, the message will be sent to the design consultant.

Until reviewers reply or mark their review complete, they have ownership of the item. Furthermore, a list of all reviewers is displayed by clicking the "Reviewers" link on the Submittal Register page. The reviewers table also provides insight into who forwarded the review and the date requested.

To forward items to other reviewers

1. Open the Submittal Item Details page.
2. Click **Forward for Review**.
The Forward for Review window is displayed.
3. Complete all necessary fields.

Note: In the **Send Type** field, you can select whether to forward the item as a notification or require action from the recipient. The Action Required option will place the item in their court. Notify, is more like a CC or an FYI. This option is typically accompanied by a message.

4. To complete your review and also forward, click **Forward and Complete Review**.

—Or—

To forward for review without marking your review complete, click **Forward for Review**.

Note: You are able to complete your review at a later time.

Related Topic:

- Submittal Item Details Page Overview

Mark Reviews Complete

Once you have completed your review of the item by adding comments, replying, and/ or attaching documents, you must mark your review complete. Doing so will remove your name from the "Held By" field on the Submittal Register page and the item will no longer be in your court. An email will be sent to the person who forwarded the item to you - this might be the submittal coordinator or another reviewer.

To mark your review complete

1. Open the Submittal Item Details page.
2. Click **Review Complete**. The Review Complete Submittal Items window appears.
3. Enter your comments.
4. If this option is available to you, select or clear the **Private** check box to make your comment either private or public.

Note: The Private Comments feature can be enabled by account administrators. This feature allows only users in select roles to view and add private comments. For more information, see Manage Private Comments..

5. Click **Review Complete**.

Related Topic:

- About the Submittal Module
- Submittal Register Page Overview

- Submittal Item Details Page Overview
- Reply to Submittal Items

Add Comments

The Add Comment page allows users of the Submittal module to add comments to individual submittal items. As a subcontractors, you can add comments as long as it is in your court. Once the item is sent off to another resource, you will no longer be able to add comments.

The following topics will assist you in adding comments:

- Add Comments to Submittal Items
- Show/ Hide Comments from Review (Submittal Coordinators)

Fields and Buttons

The fields and buttons on this page are:

- **Save:** Click to save changes.
- **Check Spelling:** Click to check the spelling of text fields.
- **Cancel:** Click to discard changes. All unsaved changes will be lost.
- **Submittal Item:** Displays name of the submittal item.
- **Comment:** Enter your comment in this field.
- **Private:** Displays only if you are in a role that has the permissions to add private comments. Select to make your comment private. Only users in roles that are able to see private comments will be able to view this message. If the submittal coordinator decides to include a Private comment in the final package to construction (Shown in Review), then the comment's visibility may automatically be changed to Public. For more information on this setting, see Manage Private Comments.
- **Attach Documents:** Click to attach a document to your comment.
- **File Name:** This column displays the name of the attached file.
- **Attached By:** This column displays the name of the person that attached the file.

Comments - Columns

- **Private:** A check mark in this column indicates that the comment is private which means that only users in roles that have permission to view private comments will be able to view this comment.
- **In Review:** This column is displayed only if the Hide Comments and Attachments feature is enabled. A check mark in this column indicates that the comment will be visible to the GC in review. For instructions on showing or hiding comments from review, see Show/Hide Comments from Review.
- **Comment:** This column displays the existing comment. From here you can make comments private or public and show or hide the comment from review, if these settings are enabled on the account. Click the title of the file to open or download it.

Stamp Submittal Documents

Document stamps are often needed to physically mark permits, drawings, submittals and payment applications. Electronically stamping PDF documents help you bypass printing, mailing and faxing files with your seal of approval. Each time a stamp is added, save the document as a new version or as a new document

altogether.

Stamps are added to the system by account administrators. If you wish to have a specific file loaded into e-Builder, see your account administrator and refer them to About Document Stamps for more information.

Note: Only PDF documents can be stamped.

To stamp submittal documents

1. Open the Submittal Item Details page.
 2. Click the **Documents** tab, and then the **Stamp** link located underneath the file you want to stamp.
- Note:** The Stamp page appears with a list of available stamps in the left navigation pane.
3. Drag and drop a stamp to the appropriate location on the file.
 4. To save the file as a new version, click **Save as New Version**. This will append a version number to the file name.

—Or—

To save the file with a new name, click **Save as New Document**. The File Name dialog displays for you to modify the document's name. Click **Save**.

Related Topics:

- Redline Submittal Documents
- Add Comments to Submittal Documents
- Reply to Submittal Items
- Send Items to another Subcontractor


Redline Submittal Documents

Adding redline markups allow you to annotate the file. Redlining does not modify the actual file; it creates an overlay on top of it that exists only in e-Builder. After you save your redline, a counter will appear under the file name that shows how many redline layers have been created for the document.

Tip

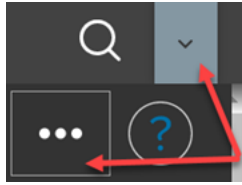
To view a redline markup outside of e-Builder, save the markup as a TIFF or PDF.

To redline submittal documents

1. Open the Submittal Item Details page.
2. Click on the **Documents** tab.
3. Click the **Redline** link located below the name of the file you wish to redline.
The file opens up in a separate redlining window.
4. Click the **Markup** icon  located in the upper left corner of the window.
5. Click **New Markup**.
6. From the Annotations drop down, select the type of markup you wish to make.
7. Once the document has been marked up, do any of the following:

- To save the file, click the **Markup** icon > **Save Markup**. Enter a unique name and then click **OK**.
- To save the file as a PDF, click the **More** icon  > **Publish to PDF**.
- To save the file as a TIFF, click the **More** icon  > **Publish to TIFF**.
- To print the file, click the **More** icon  > **Print**.

Tip: You may need to maximize the redlining window to see the **More** icon.



Note: Click the Help icon located on the upper right corner of the window. A new window displays the in-app help that describes all the options available on the redline window. Depending on your browser settings, your redline window may be 'hidden' behind the help window.

Related Topics:

- Stamp Submittal Documents
- Add Comments to Submittal Documents
- Reply to Submittal Items
- Send Items to another Subcontractor

Submittal Settings - Users

All users with View permissions to the Submittals module will be able to view the project-level submittal settings. However, only the users with Manage Project Settings permissions will be able to edit and save project-level submittal settings. The Submittal Settings page controls both optional and required settings, all of which will set the framework for the submittal process for a specific project. At a high level, here are some of the factors that you will determine from this page:

- Assign a submittal coordinator (required)
- Assign a fixed number of days for reviews to be returned
- Choose your calendar offset type (calendar days or working days)
- Determine operational factors for submittal packages
- Determine operational factors for subcontractor-initiated submittals

A description of the fields and buttons located on this page is provided below:

Submittal Settings

- **Complete Review Due Date Offset:** Enter the maximum number of days allowed for the submittal coordinator to complete the design review of submittal items or submittal packages and return them to the general contractor. The review due date offset is an optional field provided to help contractors meet time-sensitive obligations.

Example

If a contractual obligation exists for submittal items to be returned within a predetermined time frame, those number of days may be entered in this field to facilitate this initiative.

Tip

Create a weekly reports subscription for submittal items. On a weekly basis you will receive a report via email on the status of each submittal item or package. Note that you can group submittal reports by the **Held By** field and split the names listed to separate rows by clicking the **Return row for each multivalued field value** check box on the Select Columns step of the report wizard.

Best Practice

Review these reports regularly to stay abreast of the status of each submittal item and make inquiries as necessary. Having this insight allows you to take a proactive approach, intercept delays, and ensure the submittal process is aligned with the construction schedule and that contractual obligations are being met.

- **Offset Type:** Select whether the Complete Review Due Date Offset will be calculated on calendar days or working days.
- **Specify Default Folder for Attachments:** Optionally, you can specify a folder in which all attachments will be stored. This setting will apply to all submittal process participants.
- **Submittal Coordinator (Required):** Click the Select From drop-down list to narrow available names to a single role. In many organizations, the Submittal Coordinator will be the Architect/ Engineer on the project or a project manager within the owner's organization. Although you can identify multiple submittal coordinators for the project, only one submittal coordinator can be assigned to an individual item. A submittal coordinator assigned with items in review cannot be removed from the project's submittal coordinator list. The Submittal Coordinator list must have at least one name assigned. If multiple submittal coordinators exist, they cannot be removed from the list unless they are under "No items in review" heading.

Best Practice

Submittal coordinators can act on each others items, so it is a good idea to designate at least two coordinators per project in case a backup is needed.

- **Who to Notify:** Select the roles or users that should be notified when any action is taken on a submittal item.

Best Practice

Be judicious in assigning this setting because it can generate an extremely large volume of email notifications for recipients.

- **Notify Submittal Coordinator on Review Complete:** This setting is used on projects where each design reviewer uses the Forward and Complete Review action to forward to the next design reviewer (sequential or "daisy chain" reviews). When this box is checked, a notification is sent to the submittal coordinator after the final reviewer clicks Complete Review action. With the box unchecked, the submittal coordinator only receives notifications for the first level of reviews sent via Forward for Review actions. This is usually sufficient for projects using parallel design reviews.

Submittal Package Options

The options in this section affect submittal package options at the project level. Each of these settings are also available at the account level. Administrators, see Submittal Package for more information. Settings at the project level will supersede account settings.

- **Use CSI List:** Click the drop-down list to choose whether or not submittal packages should use CSI codes. This is an account level setting that applies to all projects in the account. Whether this feature is set to yes, or no, users can still enter free-form text into this field.

Yes is the default value. When CSI codes are used, they represent the second set of numbers in the submittal package number.

No will effectively remove the second Submittal Package setting option: CSI List to Use. While creating a submittal package, the CSI Codes drop-down list will not display on the Submittal Package page if this feature is set to No. However, a space will be provided for users to enter a second set of numbers in the Submittal Package # field. Free-form text entry is allowed, or the field may be left blank for a two digit set submittal package number.

- **CSI List to Use:** This option only displays if Yes is selected in the Use CSI List option. Click the drop-down arrow to select a CSI format. Available options include:
 - CSI MasterFormat 1995
 - CSI MasterFormat 2004
 - CSI MasterFormat 2012
 - User Defined List

Best Practice

If User Defined List is selected, the package numbering will use the Construction Codes from the Account Setup module, which can be loaded with an imported custom list of CSI codes.

- **Submittal Item Spec Section Populated by CSI Code:** This option is displayed only if Yes is selected in the Use CSI List option.

If selected, the Spec Section field on the Add/ Edit Submittal Item page will be a drop-down menu of CSI options as opposed to a free-form entry field. This setting would help reduce errors that could be introduced with free-text entry.

Tip

If you track items by spec section, make this a required field to ensure this information is always captured. For instructions, see Manage Required Fields.

- **Auto Numbering Packages:**
Per Code: Choose this option to automatically number submittal package records in sequential order (1, 2, 3, etc.), by division.

Example

All submittal packages in division one are numbered in sequential order. All submittal packages in division two are numbered in sequential order, and so forth.

Per Project: Choose this option to automatically number submittal package records in sequential order (1, 2, 3, etc.), regardless of division.

Example

Submittal packages are numbered sequentially in the order in which they are created, regardless of division.

- **Honor Auto-Close Status:** Select this check box, if the submittal items are to be automatically placed in the 'Closed' status when the item is set to a specific status predefined by the account administrator. This account setting can be overridden at the project level by users with Add/Edit permission or an administrator.
- **Allow Items to be Added After Review Starts:** Selecting this box enables the Add Items button on the Submittal Packages Item tab. This applies to open packages after being sent for review to the submittal coordinator. When this is turned on, team members with the following permissions can add items:
 - Create permission for the packages they authored
 - Add/ Edit permission
 - Administrators
- **Allow Revision Items to be Added to Existing Packages:** Selecting this box adds a drop-down list for Submittal Package when creating a submittal revision. From the drop-down, you can either create a new package in the same series (same package number and incremented revision), OR you can select an existing open package in the series to attach the revised item to. The revised submittal item cannot be added back into the same package that it currently exists in. For projects with large numbers of resubmittals, this helps consolidate the number of packages in review. This setting is independent from the "Allow Items to be Added After Review Starts" setting above. Revisions can be added to any open package within the package number series, even if it has been forwarded for review. For projects with large numbers of resubmittals, this helps consolidate the number of packages in review.

Subcontractor Options

This section is not visible until at least one role has been assigned the Create Submittal permission (typically used for subcontractors).

Submittal options are used on projects where subcontractors will create some or all of the submittal register items, and use the Submit to GC action to kick off the review process. If the subcontractors are not licensed e-Builder users or are not actively participating in the review process, disregard these settings.

- **General Contractors for Submission:** Select the role that contains the GC personnel who will receive the submittals from the subcontractor. The subcontractor will select an individual recipient from the list of users in the identified role.

Only roles that have the Add/ Edit Submittals permission are listed in this drop-down list. If no roles are visible, check with the Account Administrator to verify the role permissions.
- **GC Review Complete Due Date Offset:** Enter the number of planned days for the GC to complete an initial review and forward to the submittal coordinator. The offset will calculate a suggested due date in the Submit to GC step, which the subcontractor can modify if necessary.

The GC Review time frame is separate from the Complete Review time frame (for submittal coordinator and design team).

- **Offset Type:** Select whether the GC Review Complete Due Date Offset will be calculated on calendar days or working days.

Add/Edit Submittal Items

This page allows the general contractor (Add/Edit Submittal permission) or subcontractor (Create Submittal permission) to add individual submittal items to the submittal register.

Adding submittal items is typically done in bulk via import before the submittal process gets underway. Individual items can easily be added when necessary.

To access the Add Submittal Item Details page

1. On the Home page, click the **All Projects** drop-down menu to select a project.
2. In the Project Menu on the left navigation pane, click the **Submittals** link.
3. Click the title of a submittal item to view its details. The Submittal Item Details page is displayed for the selected item.
4. Click Add Item to view the Add Submittal Item page.

To access the Edit Submittal Item Details page

1. On the Home page, click the **All Projects** drop-down menu to select a project.
2. In the Project Menu on the left navigation pane, click the **Submittals** link.
3. Click the title of a submittal item to view its details. The Submittal Item Details page is displayed for the selected item.
4. Click Edit to view the Edit Submittal Items page.

A description of the buttons located on the Add/ Edit Submittal Item page is provided below:

Toolbar Buttons

- **Save & Add New:** Click to save changes and add an additional submittal item.
- **Save:** Click to save changes.
- **Cancel:** Click to discard changes and return to the Submittal Register page.

Details Section

This section allows you to enter descriptive information about the submittal.

- **Project:** Displays the project name.
- **Title:** Enter the title of the submittal item.
- **Description:** Enter an additional description of the item.
- **Number:** Submittal Item numbers are generated by e-Builder starting with 1. A number will be assigned to this item after saving.
- **Submittal Package:** The GC will typically package submittal items after they've been submitted by a subcontractor, however, the system allows you to add draft items to a package at any time. When adding a submittal item, this field is editable and allows you to choose an existing Submittal

Package to add the item to. For instructions on creating a new package, see Create Submittal Packages. When editing a submittal item, this field is editable for draft items only (Items that have not been sent to the Submittal Coordinator for review) and allows you to choose a new submittal package. Once the package has been sent for review, this will be a non-editable field.

Note: Submittal package numbers are auto-generated according to project or CSI code, depending on the account setting.

- **Spec Section:** Enter the specification section in this field. In many cases this will be the CSI code used on the submittal item.
- **Category:** Click this drop-down arrow to select the category that the submittal item belongs to. Submittal categories are customizable by account administrators, therefore available categories may vary.

Default categories provided by e-Builder include:

- As-Builts
 - Bid Submittals
 - Certification
 - Commissioning Scripts
 - Mock Up
 - Operation/Maintenance Manual
 - Product Data
 - Sample
 - Shop Drawing
 - Test Report
- **Responsible Sub/Manufacturer:** Enter the name of the subcontractor or manufacturer responsible for completing the work for this submittal item.
 - **Project Number:** If available, the project number displays in this field. Project numbers allow you to have a unique identifier for each of your projects. Account administrators can add project numbers by going to Administration Tools > Projects > Project Settings > Choose a custom field option from the Project Number Custom Field drop-down menu.
 - **Status:** By default, all new submittal items enter the system in New status. This status will be updated by the submittal coordinator after they review the item.
 - **Item Status:** Submittal items are in a draft state when they're entered into the system. Submittal item statuses typically follow this life cycle:
 - **Draft:** Items that have not yet been added to a submittal package.
 - **Open:** Items that have been added to a submittal package.
 - **Closed:** Items whose status has been updated to Close by the general contractor after review has been completed by the submittal coordinator, UNLESS the project and account setting is enabled that automatically sets the submittal item statuses to Closed when a specific status is selected by the submittal coordinator. For more information, see one of the following:
 - Account setting: Manage Submittal Register Options

- Project setting: Submittal Settings Page
- **Submittal Coordinator:** The submittal coordinator to whom the item is assigned. Project submittal coordinators and administrators can change the Submittal Coordinator on submittal items in review to another coordinator assigned on the project. Submittal coordinator changes will be logged and displayed on the History tab on the Submittal Item Details page. When the submittal coordinator is changed, an email notification will be sent to the new submittal coordinator about the submittal item assignment.

Note: This field is displayed only if the submittal coordinator reassignment feature has been enabled for the project and all users who are in the submittal coordinator list for the project will be available for selection.

- **Priority:** All items are set to Normal priority by default. Click this drop-down arrow to give this item a different priority level, such as Low or High. If changed, one of the following priority icons will appear next to the item on the Submittal Register page:

 High Priority

 Low Priority

- **Revision:** A revision number is automatically assigned when a revision is made to the item.
- **Sub Section:** Enter the sub section in this field. In many cases this will be the sub section CSI code used on the submittal item.
- **Commitment:** Click this drop-down arrow to select a commitment to tie this item to.

Date Details

This section allows you to enter the date details for the submittal item. Target dates are entered in the left column and the actual dates in the right column.

Note: Date details can also be imported. See Import Submittal Register for instructions.

- **Date Due From Subcontractor:** Date the submittal item content needs to be submitted to the general contractor from the subcontractor. Also set by the GC with the **Send to Sub** action.
- **Submit For Review Due Date:** Date the general contractor needs to send the item to the submittal coordinator to start the design review.
- **Review Complete Due Date:** Date that the design review needs to be completed, and the submittal coordinator returns the item to the general contractor. Also set by the GC with the **Send for Review** action.
- **Consultant Respond By Date:** Date that all of the design reviewers need to be completed, and returned back to the submittal coordinator. Also set by the submittal coordinator with the **Forward for Review** action. This field may or may not be editable when entering a submittal item, depending on the account setting. See Allow Editing of System-Generated Dates for more information.
- **Return Due Date:** Date the general contractor needs to return the item to the responsible sub-/manufacturer after finalization by the submittal coordinator.

- **Delivery Due Date:** Date the item needs to be delivered to the facility or final destination, after it has been approved.
- **GC Complete Review Due Date:** Date the GC needs to forward to the submittal coordinator after receiving from the subcontractor. Also set by the subcontractor with the **Send to GC** action.
- **Date Received From Subcontractor:** Actual date that the item was received from the subcontractor. Automatically updated when the subcontractor uses the **Reply** action.
- **Date Submitted For Review:** Actual date the item was sent to the submittal coordinator. Automatically updated when the GC uses the **Send for Review** button. This field may or may not be editable when entering a submittal item, depending on the account setting; see Allow Editing of System-Generated Dates for more information.
- **Date Review Completed:** Actual date the submittal coordinator completes the review of this item and sends it back to the contractor. Automatically updated when the submittal coordinator uses the **Send to Contractor** action. This field may or may not be editable when entering a submittal item, depending on the account setting. See Allow Editing of System-Generated Dates for more information.
- **Consultant Review Complete Date:** Actual date when the final design reviewer completes review and returns to the submittal coordinator. Automatically updated when the final reviewer uses the **Review Complete** action. This field is not editable when entering a submittal item. This date will automatically update when the final reviewer returns the item to the submittal coordinator.
- **Date Returned:** Enter the actual date that the item was sent to the responsible party, after the submittal coordinator's finalization.
- **Date Delivered:** Enter the actual date that the item was delivered to its destination.
- **Date Sent to Subcontractor:** Actual date the GC requests documentation from the subcontractor. Automatically updated when the GC uses the **Send to Sub** action.
- **Date Sent to GC:** Actual date the subcontractor sends item to the GC. Automatically updated when the subcontractor uses the **Submit to GC** action.

Custom Fields

If available, submittal custom fields are displayed in this section for you to complete.

Submittal Item Details

This page allows you to view the details of a submittal item. The different participants of the submittal process will be able to take certain actions from this page, depending on the state of the item. Below is a list of tasks that each participant can complete from this page if the item is in their court.

Tasks in the Submittal process	
<p><i>General Contractor Tasks:</i></p> <ul style="list-style-type: none"> • Send Item to Subcontractor • Delete Submittal Item • Edit Submittal Details 	<p><i>Submittal Coordinator Tasks:</i></p> <ul style="list-style-type: none"> • Forward Items for Review • Update Status of Individual Item

Tasks in the Submittal process

Subcontractor Tasks:

- Edit Submittal Details
- Delete Submittal Item
- Submit Item to GC
- Send Items to Another Sub-contractor
- Reply to Submittal Items

Reviewer Tasks:

- Forward Items to other Reviewers
- Complete Review of Submittal Items

A description of the fields, buttons and tabs located on this page are provided below:

Action Buttons

General Contractor with Add/ Edit Submittal Permission

- **Send to Sub:** Click to send the item to a subcontractor. For instructions, see Send Item to Sub-contractor.
This button displays only for draft submittal items that have not yet been sent to the submittal coordinator for review.
- **Delete:** Click to delete the item. For instructions, see Delete Submittal Items.
This button is displayed only for draft submittal items (items that have not yet been sent to the submittal coordinator for review or items that have not yet been added to a submittal package).
- **Edit:** Click to edit the details of the item. For instructions, see Edit Submittal Details.
This button is displayed only for draft submittal items that have not yet been sent to the submittal coordinator for review.
- **Close:** Click to close the item.
This button is displayed for Open items that have been returned by the Submittal Coordinator after the design review is completed.

Subcontractor with Create Submittal Permission

- **Submit to GC:** Click to send the item to a general contractor. Items do not need to be inside a package at this point. For instructions, see Submit Items to GC.
This button is displayed only for draft submittal items that were created by the subcontractor with Create permissions.
- **Delete:** Click to delete the item. For instructions, see Delete Submittal Items.
This button is displayed only for draft submittal items that were created by the subcontractor with Create permissions.
- **Edit:** Click to edit the details of the item. For instructions, see Edit Submittal Details.
This button is displayed only for draft submittal items that were created by the subcontractor with Create permissions.
- **Send to Sub:** Click to send the item to a subcontractor. For instructions, see Send Items to Sub-contractor.
This button is displayed only to licensed subcontractors who receive a submittal item from the GC

using Send to Sub action. The receiving subcontractor can in turn send the item to a different subcontractor.

- **Reply:** Replying will remove your name from the Held By column and the item will no longer be in your court. For instructions, see Reply to Submittal Items.

This button is displayed only to subcontractors who receive a submittal item from the GC using Send to Sub action. The receiving subcontractor can reply to the person that sent the submittal item; this may be the general contractor or another subcontractor.

Submittal Coordinator

- **Forward for Review:** Click to forward the item to the design team for review. For instructions, see Forward Items for Review.
- **Update Status:** Click to update the status of the submittal item. For instructions, see Update Status of Individual Item.

Reviewer

- **Forward for Review:** Click to forward the item for review. Doing so will add the recipient's name in the Held By field on the Submittal Register page. When this person responds, it will be sent back to you. For instructions, see Forward Items to other Reviewers.
Only e-Builder licensed reviewers are able to forward items on to other reviewers. External reviewers (those that do not have an e-Builder license) are not able to forward items for review.
- **Review Complete:** Click to mark your review complete. This will place the item back in the court of the person that forwarded it to you. For instructions, see Mark Review Complete.

Tabs

Submittal Item Overview Tab

For a list of fields in this section and their descriptions, see Add/Edit Submittal Item Page Overview.

The following tabs are available at the bottom of the page:

- **Documents Tab:** The Documents tab lists all files that are attached to the item. If the item is in your court, you can also add documents of your own.

Note: If the Hide Comments and Attachments feature is enabled on your account, submittal coordinators will see options to show or hide attachments in review. With this account setting, comments and attachments added by reviewers and the submittal coordinators are hidden by default and the submittal coordinator will have to choose which ones to make visible to the general contractor. Note that the submittal also needs to be in the submittal coordinator's court in order to make these edits.

- **Comments Tab:** The Comments tab lists all comments made about the item. If the item is in your court, you can also add comments of your own.

Note:

- If the Hide Comments and Attachments feature is enabled on your account, submittal coordinators will see options to show or hide comments in review for items in their court.
 - With this account setting, comments and attachments added by reviewers and the submittal coordinators are hidden by default. The submittal coordinator will choose which items to make visible to the general contractor as part of the final review.
- **Custom Fields Tab:** The Custom Fields tab lists the custom fields associated with the item.
 - **Revisions Tab:** The Revisions tab lists all the details of all revisions to the item.

Date Details Tab

- **Date Descriptions:** Refer to the Add/Edit Submittal Item Page Overview.

History Tab

- **Created By:** Displays the name of the person who added the item the system.
- **Last Modified By:** Displays the name of the person who last modified the item.
- **Last Action:** Displays the name of the person who last took action on the item.
- **Created Date:** Displays the date that the item was created.
- **Last Modified Date:** Displays the date that the item was last modified.
- **Last Action Date:** Displays the date that action was last taken on the item.
- **Action:** Displays the action that was taken on the item.
- **User:** Displays the name of the user that took the action.
- **Date:** Displays the date that the action was taken on the item.
- **Description:** Displays the description of the action in more detail.
- **Previous:** Displays the status of the item before the action was taken.
- **New:** Displays the status of the item after the action was taken

Submittal Package

The Submittal Package page lists all available submittal packages and high-level details for each package.

Submittal Packages are used to group related Submittal Items that move through the review process together and serves as a convenient mechanism to apply actions in bulk to all of the Submittal Items within the package. However, sometimes during the review process, it becomes apparent that certain items within a package require different reviewers or longer review periods. E-Builder provides the flexibility to handle each submittal item separately if necessary.

Note: When the View draft submittals account-level setting is enabled, all team members who have the View Submittals permission will be able to see Submittal Packages that are in Draft status.

The columns included in the table of Submittal Packages on this page may vary if the account administrator has established custom submittal package layouts through the Setup Module.

The following actions can be taken from this page:

General Contractor Tasks:

- Create Submittal Packages
- Send Submittal Packages for Review

Subcontractor Tasks:

- Create Submittal Packages
- Submit Submittal Packages to GC

Submittal Package page - Fields and Buttons

Tip: The Submittal Package filter allows you to narrow down the results list to just the packages you need to view. This filter can be collapsed to increase screen real estate, and then expanded if necessary, by clicking the expand/collapse button in the upper-left corner of the page.

A description of the fields and buttons located on the Submittal Package page is below:

- **Title:** Enter the title of a package to filter by.
- **Description:** Enter text included in the description of a specific item(s) to filter by.
- **Trade:** Enter a trade in this field to filter by packages of a specific trade.
- **Submittal Package #:** Enter a submittal package number to filter by items located in a specific page. You can filter on any part of the package number.
- **Priority:** Click to filter for packages the include items of a specific priority level.
- **Custom Field 1:** If applicable, click this drop-down arrow or enter a submittal package custom field to filter by packages that are associated with a particular custom field.
- **Open:** Select to filter for open packages, which are those that have not yet been sent for review.
- **Closed:** Select to filter for closed packages.
- **Draft:** Select to filter for draft packages.
- **Overdue:** Select to filter for overdue packages.
- **Custom Field 2:** If applicable, click this drop-down arrow or enter a submittal package custom field to filter by packages that are associated with a particular custom field.
- **Clear:** Click to clear the filter.
- **Filter:** Click to filter by the specified criteria.
- **Create Package:** Click to create a new submittal package.
- **Send for Review:** Click to send select packages to the submittal coordinator for review.
- **Title:** Displays the title of the package.
- **Description:** Displays the description of the package.
- **Package #:** Displays the package number.
- **Revision Number:** Displays the revision number.
- **Status:** Displays the status of the package.
- **Held By:** Displays the name or email address of the people who currently have ownership of an item located in the package.

Submittal Packages Details

The Submittal Package Details page allows all participants of the submittal process to view the details of a package and take the appropriate actions. The action buttons are permissions based, and therefore may not be available to all team members.

The top portion of this page provides high level information about the package. The Items tab below this lists all the items in the package.

The following actions can be taken from this page:

Actions that can be taken from the Submittal Package Details page	
<p><i>General Contractor Tasks:</i></p> <ul style="list-style-type: none"> • Request Comment • Generate Transmittals • Update Dates • Edit Package • Close Package • Reopen Package • Send Individual Items for Review • Send Item to Subcontractor • Create Revision • Add/ Remove Items from Submittal Package 	<p><i>Submittal Coordinator Tasks:</i></p> <ul style="list-style-type: none"> • Request Comment • Generate Transmittals • Update Status of Multiple Submittal Items • Update Status of Individual Item • Edit Package • Forward Items for Review • Send Items to Contractor
<p><i>Subcontractor Tasks:</i></p> <ul style="list-style-type: none"> • Request Comment • Add Items to Submittal Packages • Remove Items from Submittal Package • Edit Package • Submit Item to GC • Send Item to another Subcontractor • Reply to Submittal Item • Close Submittals • Reopen Submittals • Create Revision Submittals 	<p><i>Reviewer Tasks:</i></p> <ul style="list-style-type: none"> • Request Comment • Forward Items to Other Reviewers • Mark Reviews Complete

The following sections on this page are available below:

General Contractor Action Buttons - Add/ Edit Permissions

- **Request Comment:** Click to request a comment on the submittal package. This feature may be used if additional information is needed.

- **Update Dates:** Click to update the dates of the items located in the submittal package.
- **Generate Transmittal:** Click to generate a transmittal. A transmittal is a word document that summarizes the details of a submittal package. The name of the package, and a list of all submittal items the package is comprised of are listed in a transmittal. Details for each submittal item are also included such as item numbers, categories, statuses, and notes. A transmittal can be used in a number of ways. They are often used as a cover sheet when sending hard copy materials to the submittal coordinator. Optionally, a transmittal can also be attached to a submittal package before it is sent to the submittal coordinator to maintain a paper trail of physical materials.
- **Close:** Click to close the submittal package.
- **Edit:** Click to make changes to the details of the package, such as the package name, description, package number and trade.
- **Send for Review (Item Level):** Click to send selected items to the submittal coordinator for review. The submittal item status will change from "NEW" to "In Review".

Note: You can send individual items for review even if they are in the court of a subcontractor. Doing so will update the "Held By" field with the submittal coordinator's name.

- **Send to Sub (Item Level):** Click to send selected items to a subcontractor to request that they attach documentation for review.
- **Add Items (Item Level):** Click to add existing or new submittal items from the submittal register into the package. This action only applies to Draft packages, or if the Project Submittal Setting "Allow items to be added after review starts" option is turned on.
- **Create Revision (Item Level):** Click to create a revision to the submittal package that contains the selected items. This action only applies to items that have been returned from the Submittal Coordinator. This action creates a new package in Draft status with the next sequential revision number. You will have the option to rename the new revision package. Selected items are also incremented to the next revision numbers and added to the revised package.
- **Remove Items (Item Level):** Click to remove items from the submittal package. In the event that items were added to a package incorrectly, general contractors are able to remove these items as long as the package is not in Close or Approve status. To remove individual item(s), they cannot be approved or currently in review.

Subcontractor Action Buttons - Create Permissions

- **Request Comment:** Click to request a comment on the submittal package. This feature may be used in case additional information is needed.
- **Edit:** Click to make changes to the details of the package, such as the package name, description, package number and trade. This action is only available for Draft packages that the subcontractor created.
- **Send to GC (Item Level):** Click to send selected items to a general contractor to start the review process.
- **Add Items (Item Level):** Click to add existing or new submittal items from the submittal register into the package. This action only applies to Draft packages that the subcontractor created, or if the Project Submittal Setting **Allow items to be added after review starts** option is turned on.

- **Remove Items (Item Level):** Click to remove items from the submittal package. In the event that items were added to a package incorrectly, subcontractors are able to remove these items from packages that they created, as long as the package is not in Close or Approve status. The individual item(s) cannot be approved or currently in review.
- **Close:** Click to close the submittal package.
- **Create Revision (Item Level):** Click to create a revision to the submittal package that contains the selected items. This action only applies to items that have been returned from the Submittal Coordinator. This action creates a new package in Draft status with the next sequential revision number. You will have the option to rename the new revision package. Selected items are also incremented to the next revision numbers and added to the revised package.

Subcontractor Action Buttons - View Permissions

- **Send to Sub (Item Level):** Click to send selected items to another subcontractor. This action is available on items that the GC sent using the **Send To Sub** action. You may need to send items to another sub for a second opinion or to solicit additional information. When the recipient replies, the message will be sent directly to you. A log of this action will be captured on the submittal item history tab. Additionally, the recipient's name or email address (for external subcontractors) will be added to the "Held By" column on the Submittal Register page, indicating that the item is currently in their court as well. When they reply, their name will be removed from this column, but will remain on the list of reviewers.

Note: Only licensed e-Builder subcontractors are able to send items to another subcontractor.

- **Reply (Item Level):** Replying to the submittal item will send a message to the person that sent you the submittal item. This action is available on items that the GC sent using the **Send To Sub** action. The item may have been sent to you by the general contractor or another subcontractor. After replying, your name will be removed from the "Held By" column and the item will no longer be in your court.

Submittal Coordinator Action Buttons

- **Request Comment:** Click to request a comment on the submittal package. This feature may be used in case additional information is needed.
- **Generate Transmittal:** Click to generate a transmittal. A transmittal is a word document that summarizes the details of a submittal package. The name of the package, and a list of all submittal items the package is comprised of are listed in a transmittal. Details for each submittal item are also included, such as item numbers, categories, statuses, and notes. A transmittal can be used in a number of ways. They are often used as a cover sheet when sending hard copy materials to the general contractor. Optionally, a transmittal can also be attached to a submittal package before it is sent to the general contractor to maintain a paper trail of physical materials.
- **Update Status (Item Level):** Click to update the status of selected items.
- **Send to Contractor (Item Level):** Click to send selected items to the contractor. Individual items can be sent back to the contractor as they are completed. Furthermore, if responses have not been received from reviewers, it will not restrict you from completing the review and sending the item back to the contractor.

- **Forward for Review (Item Level):** Click to forward selected items for review. Multiple items can be forwarded at a time. e-Builder-licensed reviewers have the ability to forward items to other reviewers as well. To see a list of everyone who the item was sent to, click the "Reviewers" link on the Submittal Register page. The reviewers whose court the item is in (meaning those who have not yet responded to the review request) will be listed in the "Held By" column on the Submittal Register page. The item will not be back in your court until all reviews are complete. However, you will still be able to send items back to the GC, even if all reviewers do not provide a response.

Reviewer Action Buttons

- **Request Comment:** Click to request a comment on the submittal package. This feature may be used when additional information is needed.
- **Forward for Review (Item Level):** Click to forward selected items for review. This action is available for items where the reviewer is included in the Held By list. External reviewers (those that do not have an e-Builder license) are not able to forward items to other reviewers. When an item is forwarded, it is listed in the recipients' courts and their name(s) or email addresses (external reviewers) will appear in the "Held By" column on the Submittal Register page. When recipients reply or mark their review complete, their name will be removed from this column. All replies are sent to the person who forwarded the item, not necessarily to the submittal coordinator. For example, if a design consultant forwards the item to an external consultant for additional information, when the external party replies, the message will be sent to the design consultant. Until reviewers reply or mark their review complete, they have ownership of the item. A list of all reviewers will be available by clicking the "Reviewers" link on the Submittal Register page. The reviewers table also provides insight into who forwarded the review and the date requested.

Note: Only e-Builder-licensed reviewers are able to forward items to other reviewers.

- **Review Complete (Item Level):** Click to mark your review of selected items as complete. This action is available for items where the reviewer is included in the Held By list. Doing so will remove your name from the "Held By" field on the Submittal Register page and the item will no longer be in your court. An email will be sent to the person who forwarded the item to you - this might be the submittal coordinator or another reviewer.

Submittal Package Overview Tab

See Submittal Package Page Overview for the field descriptions for this tab.

- **Submittal Coordinator:** Displays the name of the submittal coordinator the pack was sent to.
- **Baseline Start Range:** Displays the date range that items in the package are due. This field will give you a sense of the timeline for when items in the package should at least get started.
- **Baseline Finish Range:** Displays the date range that items in the package were completed. This field will give you a sense of the timeline for when items in the package should be completed.

History Tab

- **Created By:** Displays the name of the person that created the package.
- **Last Modified By:** Displays the name of the person who last modified the package.
- **Last Action:** Displays the name of the person who last took action on the package.

- **Created Date:** Displays the date when the package was created.
- **Last Modified Date:** Displays the date that the package was last modified.
- **Last Action Date:** Displays the date that action was last taken on the package.
- **Action:** Displays the action that was taken on the package.
- **User:** Displays the name of the user that took the action.
- **Date:** Displays the date that the action was taken on the item.
- **Description:** Displays the description of the action in more detail.

Item Details

- **Item Icons:** The paper clip and comment icons give you the options to view existing attachments and comments, and add new ones. General contractors with add/ edit permissions will also see a calendar icon that allows them to edit the item date details.
- **Title:** Displays the title of the submittal item. Click to open the Submittal Item Details page. If available, the description icon is displayed; click to view a description of the item as entered by the general contractor.
- **#:** Displays the submittal item number.
- **Rev #:** Displays the submittal item's revision number.
- **Spec Section:** Displays the spec section number. The spec section refers to a section number in the specifications which itemizes the details of that section; such as Masonry, for example. This is usually based on the CSI division.
- **Sub Section:** Displays the sub section number. The sub section refers to the subsection number of the specifications which itemizes the details of that section. This is usually based on the CSI division and its spec section.
- **Category:** Displays the category that the submittal item belongs to.
- **Status:** Displays the status of the item as assigned by the submittal coordinator. Submittal statuses and prefixes are customizable by account administrators, therefore available statuses may vary. Below is a description of the default statuses, which may or may not be used by your particular account:
 - App - Approved
 - AAN - Approved as Noted
 - FRO - For Record Only
 - ONH - On Hold
 - REJ - Rejected
 - REV - Revise
 - RAR -Revise & Resubmit
- **Submittal Coordinator:** Displays the name of the submittal coordinator.
- **Held By:** Displays the name of the person(s) in whose court the item is currently in.
- **General Contractor and Subcontractors:** If the item was sent to a subcontractor, their name or email address (if an external subcontractor) will appear in this field. Internal subcontractors are able

to send items to other subcontractors. If this occurs, and neither of these users have taken action on the item, both of their names will appear in this field.

- **Submittal Coordinator and Reviewers:** If the item was sent for review by the submittal coordinator to one or more reviewers, the name or email address (if an external reviewer) of those reviewers will appear in this field, as long as they have not yet taken action on the item.
- **Reviewers:** A 'Reviewers' link appears in this column when the item has been forwarded for review by the submittal coordinator or sub-consultants. Click this link to view a list of all reviewers of the item and when their reviews were completed, if applicable.
- **Documents Tab:** The Documents tab lists all files that are attached to the item. If the item is in your court, you can also add documents of your own.
- **Comments Tab:** The Comments tab lists all comments made about the item. If the item is in your court, you can also add comments of your own.

Note: If the Hide Comments and Attachments feature is enabled on your account, submittal coordinators will see options to show or hide comments in review. With this account setting, comments and attachments added by reviewers and the submittal coordinators are hidden by default and the submittal coordinator will have to choose which ones to make visible to the general contractor.

- **Custom Fields Tab:** The Custom Fields tab lists the custom fields associated with the item.
- **Revisions Tab:** The Revisions tab lists the details of all revisions to the package.

Create Submittal Package Page

This page allows the general contractor (Add/Edit Submittals permission) or the subcontractor (Create Submittal permission) to create a new submittal package. Individual submittal items must first be added to a package before they can be sent to the submittal coordinator to start the design review. For instructions, see Create Submittal Packages.

At the package level, Submittal Coordinators can edit descriptive information (such as the Submittal Package Name or Submittal Package #) when all the items in the submittal package are in review. If some or all of the items inside the package are in the court of an Add/Edit team member, then the package will not be available for editing.

Note: Submittal Coordinators can edit items in review only if the **Allow Submittal Coordinator and Project Admin to edit submittal item fields while in review** permission has been enabled on the Submittal Settings page.

A description of the fields and buttons located on this page are provided below:

Toolbar Buttons

- **Save:** Click to save changes.
- **Cancel:** Click to discard changes and return to the Submittal Register page.

Details

Field Descriptions

- **Project:** Displays the project name.
- **Project Number:** If available, the project number displays in this field. Project numbers allow you to have a unique identifier for each of your projects. Account administrators can add project numbers by going to Administration Tools > Projects > Project Settings > Choose a custom field option from the Project Number Custom Field drop-down menu.
- **Submittal Package #:** Enter the submittal package number in this field.
- **Submittal Package Name:** Enter a name for the package in this field.
- **Description:** Enter a description of the package in this field.
- **Trade:** Enter the trade for which the items in the package will be associated with.

Custom Fields

Custom fields that are available in this section can be edited.

Send for Review

This page allows general contractors to send items to the submittal coordinator for review. The entire submittal package can be sent for review or individual packaged items, if all items of a package are not yet ready to be reviewed. For instructions, see:

- Send Submittal Package for Review
- Send Individual Items for Review

Fields and Buttons

The fields and buttons on this page are:

- **Send for review:** Click this button to send the package for review. When a submitter (General Contractor) clicks the **Send for Review** button on the Items tab of the Submittal Package Details page, the submittal item status will change from "NEW" to "In Review".
- **Cancel:** Click this button to cancel the action and close the Send for review window.
- **Submittal Coordinators:** Click this drop-down list to select a submittal coordinator.
- **Review Complete Due Date:** Click the calendar icon to select a due date for the submittal package.
- **CC:** Select any e-Builder users you would like to copy. Click the blue arrow pointed to the right to add their names to the adjacent menu. Repeat this step for all users you wish to copy.
- **CC External Users Via Email:** To CC an external user, enter the email address in this field. You can also search for a user in the e-Builder contacts list by clicking **Lookup**. After selecting the desired contact from the filter results, click **Insert Selected** to add it to the **CC External Users Via Email** field.
- **Select folder for external user to attach files:** If an external user is selected, a folder for the external user to save attached files must be selected. Click this link. The e-Builder Documents folder structure displays. Make a folder selection.
- **Message:** Enter a message to accompany the submittal package(s).
- **Private:** If this option is available to you, select or clear the **Private** check box to make your comment either private or public.

Note: The Private Comments feature can be enabled by account administrators. This feature allows only users in select roles to view and add private comments. For more information, see [Manage Private Comments](#).

- **Selected submittal items:** This section lists the items that are being sent to the submittal coordinator.

Update Submittal Item Dates

While entering items into the system, either via import or individually, the general contractor will include the due dates and if applicable the actual date details for the items. These details may change as the submittal process proceeds. This page allows you to make the necessary changes to date details. It's important to be accurate about these dates, as reports can be run for these details to help the administrative team identify potential bottlenecks.

Filter Submittal Items - Fields and Buttons

The Submittal filter allows you to narrow down the results list to just the items you need to view. This filter can be collapsed to increase screen real estate, and then expanded if necessary, by clicking the expand/collapse button in the upper-left corner of the page.

The fields and buttons in this section are:

- **Title:** Enter the title of a specific submittal item to filter by.
- **Status:** Click to choose a specific submittal status to filter by.
- **Number:** Enter a specific submittal item number to filter by.
- **Revision:** Enter a specific submittal item revision number to filter by.
- **Submittal Package #:** Enter a submittal package number to filter by items located in a specific page. You can filter on any part of the package number.
- **Responsible Sub/Manufacturer:** Enter the name of a sub-consultant or manufacturer to filter by.
- **Custom Field 1:** If applicable, click this drop-down arrow or enter a submittal package custom field to filter by packages that are associated with a particular custom field.
- **Open:** Select to filter for open submittal items, which are those that have been added to a submittal package.
- **Draft:** Select to filter by draft submittal items.
- **Description:** Enter text included in the description of a specific item(s) to filter by.
- **Category:** Click to include a specific category of submittal items to filter by.
- **Priority:** Click to choose a specific priority of items to filter by.
- **Spec Section:** Enter the spec section to filter by. The spec section refers to a section number in the specifications which itemizes the details of that section; such as Masonry, for example. This is usually based on the CSI division.
- **Sub Section:** Enter the sub section to filter by. The sub section refers to the subsection number of the specifications which itemizes the details of that section. This is usually based on the CSI division and its spec section.

- **Custom Field 2:** If applicable, click this drop-down arrow or enter a submittal package custom field to filter by packages that are associated with a particular custom field.
- **Clear:** Click to clear the filter.
- **Filter:** Click to filter by entered criteria.

General Contractor Action Buttons

As a general contractor, you should have Add/Edit Submittal permissions, which will give you the ability to take the actions implied by each of command buttons listed below.

Update Dates:

Submittal Items Table

- **Title:** Displays the title of the submittal item. Click to open the Submittal Item Details page. If available, the description icon appears () - click to view a description of the item as entered by the general contractor.
- **#:** Displays the submittal item number.
- **Rev #:** Displays the submittal item's revision number.
- **Package #:** Displays the submittal package number that the items belongs to. If a number does not display, the item has not yet been added to a package.
- **Spec Section:** Displays the spec section number. The spec section refers to a section number in the specifications which itemizes the details of that section; such as Masonry, for example. This is usually based on the CSI division.
- **Sub Section:** Displays the sub section number. The sub section refers to the subsection number of the specifications which itemizes the details of that section. This is usually based on the CSI division and its spec section.
- **Category:** Displays the category that the submittal item belongs to.
- **Status:** Displays the status of the item as assigned by the submittal coordinator. Submittal statuses and prefixes are customizable by account administrators, therefore available statuses may vary. Below is a description of the default statuses, which may or may not be used by your particular account:
 - App - Approved
 - AAN - Approved as Noted
 - FRO - For Record Only
 - ONH - On Hold
 - REJ - Rejected
 - REV - Revise
 - RAR -Revise & Resubmit

Send Items to Sub

This page allows general contractors and internal subcontractors to send items to subs. Please note that only e-Builder-licensed subcontractors are able to send items to another sub. For instructions, see:

- Send Items to Subcontractor
- Send Items to another Subcontractor

Fields and Buttons

The fields and buttons on this page are:

- **Send to Sub:** Click this button to send item(s) to the subcontractor.
- **Cancel:** Click this button to cancel the action and close the Send Item to window.
- **Forward To:** This is a required section. The recipient of the submittal item(s) is selected based on whether they are an e-Builder user or an external user.

If the recipient is an e-Builder user:

- 1. Click the **Select a Role** drop-down list to narrow your search by user role. On users in the selected role displays in the Select Recipient drop-down list.
- 2. Click the **Select Recipient** drop-down list to choose a recipient from a list of users.

If the recipient is an external user:

1. Enter the email address of the person you are forwarding.
—Or—
To search for the user in the e-Builder contacts list, click **Lookup**. The contacts filter displays.
 2. Input all or portions of the requested information, and then click **Filter**.
 3. Put a check mark next to the contact's name and click **Insert Selected**.
- **Send Type:**
 - **Action Required:** Select this option to indicate to the recipient that an action is required of them. This option will add the recipient to the Held By list and flag their In My Court list. This option is typically used:
 - At the beginning of the review cycle for the general contractor to request submittal documentation from a subcontractor who is not licensed with e-Builder.
 - At the end of the review cycle for the general contractor to return a submittal to the subcontractor author for resubmission.
 - **Notify:** Select this option to indicate to the recipient that they are only being notified, but no action is required of them. This option is typically used at the end of a review cycle to notify affected subcontractors that a submittal has been returned without a need for resubmission.
 - **Respond By:** This field is only applicable if the **Action Required** option is selected. Click the calendar icon to select a response date.
 - **CC:** Select the e-Builder users you would like to copy. You can select user roles or individual users. Click the blue arrow pointed to the right to add their names to the adjacent box. Repeat this step for all users you want to copy.
 - **CC External Users Via Email:** To CC an external user, enter the email address in this field. You can also search for a user in the e-Builder contacts list by clicking **Lookup**. After selecting the desired contact from the filter results, click **Insert Selected** to add it to the **CC External Users Via Email** field.

- **Select folder for external user to attach files:** If an external user is selected, a folder for the external user to save attached files must be selected. Click this link. The e-Builder Documents folder structure displays. Make a folder selection.
- **Message:** Enter a message to accompany the submittal item(s).
- **Private:** If this option is available to you, select or clear the **Private** check box to make your comment either private or public.

Note: The Private Comments feature can be enabled by account administrators. This feature allows only users in select roles to view and add private comments. For more information, see [Manage Private Comments](#).

- **Selected submittal items:** This section lists the items that are being sent to the subcontractor.

Forward for Review

This page allows submittal coordinators and e-Builder licensed sub-consultants to forward items to reviewers. It's important to note that there are two types of forwards. You can forward to simply notify the recipient of the item or require action from them. Notifying is simply an FYI because the item is not placed in their court. Requiring action places the item in the recipient's court. For instructions, see one of the following:

- [Forward Items for Review](#)
- [Forward Items to Other Reviewers](#)

Fields and Buttons

The fields and buttons on this page are:

- **Forward for Review:** Click to forward item(s) for review.
- **Cancel:** Click to cancel the action and close this window.
- **Forward To:** Only e-Builder licensed users appear in the list of available users. Select the users to forward to and then click the right directional arrow to add them to the adjacent box. To forward to external users, enter their email address in the subsequent **and/or Enter external user (email)**.
- **Send Type:**
 - **Action Required:** Select to require the recipient to take action on the item. This will place the item in their court, which indicates that they have a responsibility to take action on the item.
 - **Notify:** Select this radio button to indicate to the recipient that they are only being notified, but no action is required of them.
- **Respond By:** This field is only applicable if the **Action Required** option is selected. Click the calendar icon to select a response date.
- **CC:** Select any e-Builder users you would like to copy. Click the blue arrow pointed to the right to add their names to the adjacent menu. Repeat this step for all users you wish to copy.
- **CC External Users Via Email:** To CC an external user, enter the email address in this field. You can also search for a user in the e-Builder contacts list by clicking **Lookup**. After selecting the desired contact from the filter results, click **Insert Selected** to add it to the **CC External Users Via Email** field.

- **Select folder for external user to attach files:** If an external user is selected, a folder for the external user to save attachments to must be selected.
- **Message:** Enter a message to accompany the submittal item(s).
- **Private:** If this option is available to you, select or clear the **Private** check box to make your comment either private or public.

Note: The Private Comments feature can be enabled by account administrators. This feature allows only users in select roles to view and add private comments. For more information, see [Manage Private Comments](#).

- **Selected submittal items:** This section lists the items that are being forwarded for review.

Add Comments

The Add Comment page allows users of the Submittal module to add comments to individual submittal items. As a subcontractors, you can add comments as long as it is in your court. Once the item is sent off to another resource, you will no longer be able to add comments.

The following topics will assist you in adding comments:

- [Add Comments to Submittal Items](#)
- [Show/ Hide Comments from Review \(Submittal Coordinators\)](#)

Fields and Buttons

The fields and buttons on this page are:

- **Save:** Click to save changes.
- **Check Spelling:** Click to check the spelling of text fields.
- **Cancel:** Click to discard changes. All unsaved changes will be lost.
- **Submittal Item:** Displays name of the submittal item.
- **Comment:** Enter your comment in this field.
- **Private:** Displays only if you are in a role that has the permissions to add private comments. Select to make your comment private. Only users in roles that are able to see private comments will be able to view this message. If the submittal coordinator decides to include a Private comment in the final package to construction (Shown in Review), then the comment's visibility may automatically be changed to Public. For more information on this setting, see [Manage Private Comments](#).
- **Attach Documents:** Click to attach a document to your comment.
- **File Name:** This column displays the name of the attached file.
- **Attached By:** This column displays the name of the person that attached the file.

Comments - Columns

- **Private:** A check mark in this column indicates that the comment is private which means that only users in roles that have permission to view private comments will be able to view this comment.
- **In Review:** This column is displayed only if the Hide Comments and Attachments feature is enabled. A check mark in this column indicates that the comment will be visible to the GC in review. For instructions on showing or hiding comments from review, see [Show/Hide Comments from Review](#).

- **Comment:** This column displays the existing comment. From here you can make comments private or public and show or hide the comment from review, if these settings are enabled on the account. Click the title of the file to open or download it.

Submit to GC

This page allows subcontractors with Create Submittal permissions to kick off the review process by sending submittal documentation to the general contractors directly. This saves the GC the effort of creating all submittal items and requesting documentation through the **Send to Sub** action.

Submit to GC - Fields and Buttons

The fields and buttons located on this page are:

- **General Contractor:** This is a required field. The dropdown list of individuals who can receive the submittal is determined by the general contractor role identified in the **Project Submittal Settings** under Subcontractor Options.
 - **GC Review Complete Due Date:** This is a required field. The date is pre-filled based on the offset time-frame identified in the **Project Submittal Settings** under Subcontractor Options, but can be modified if needed. Click the calendar icon to select a response date.
 - **CC Roles:** Select the e-Builder roles you would like to copy. Click the blue arrow pointed to the right to add their names to the adjacent box. Repeat this step for all users you want to copy.
 - **CC Users:** Select the e-Builder users you would like to copy. You can select user roles or individual users. Click the blue arrow pointed to the right to add their names to the adjacent box. Repeat this step for all users you want to copy.
 - **CC External Users Via Email:** To copy an external user:
 - Enter the email address in the CC External Users Via Email field.
 - Or—
 - To search for the user in the e-Builder contacts list, click **Lookup**. The contacts filter displays.
 - Input all or portions of the requested information, then click **Filter**.
 - Put a check mark next to the contact's name and click **Insert Selected**.
 - If the external user is an e-Builder contact, use your keyboard to auto-fill the desired email address. Begin typing the recipient's name or email address then use the arrows to highlight the email of choice, and then click Tab to make the selection.
 - **Message:** Enter a message to accompany the submittal item(s).
 - **Private:** If this option is available to you, select or clear the **Private** check box to make your comment either private or public.
- Note:** The Private Comments feature can be enabled by account administrators. This feature allows only users in select roles to view and add private comments. For more information, see Manage Private Comments.
- **Selected submittal items:** This section lists the items that are being sent to the subcontractor.

Reopen a Submittal Package

If a submittal package was closed in error or it is later determined that it should be open, it can be reopened. Reopening a submittal package will return it to the Open status.

To reopen a closed submittal package

1. Go to the Submittal Packages page for the project.

For more information, see the Access Submittals page for instructions on how to access the Submittal Packages page.

Tip: Use the Filter Submittal Packages section to narrow filter results to show only closed submittal packages. This will help you access the desired submittal package more easily. In the Package Status field, select the **Closed** check box and then click **Filter**.

2. Click the title or the package # of the submittal package you want to reopen.
The Submittal Package Details page is displayed.
3. Click **Re-Open**. The Add Comment popup is displayed.
4. Enter a comment, if required.
5. Click **Re-Open** to confirm. The submittal package is now re-opened.

To reopen a closed submittal package by re-opening a submittal package item in it

Note: Re-opening a submittal item will also re-open the submittal package that it is part of.

1. Go to the Submittal Packages page for the project.

For more information, see the Access Submittals page for instructions on how to access the Submittal Packages page.

Tip: Use the Filter Submittal Packages section to narrow filter results to show only closed submittal packages. This will help you access the desired submittal package more easily. In the Package Status field, select the **Closed** check box and then click **Filter**.

2. Click the title or the package # of the submittal package you want to reopen.
The Submittal Package Details page is displayed.
3. Click on a submittal item to view the Submittal Item Details page.
4. Click **Re-Open**. The Add Comment page is displayed.
5. Enter a comment, if required.
6. Click **Re-Open** to confirm. The submittal package and submittal item is now re-opened.

About Time Tracking

Time Tracking facilitates resource management by allowing team members to submit time sheets for billable and non-billable activities. Time sheets are then routed to the correct approver(s) based on the configured workflow for the role submitting the time sheet. Account administrators can optionally enable Cost Integration, which will give you the ability to tie labor costs to different project commitments in order to better manage total project costs. Labor costs are factored into the equation using bill rates. Cost integration allows you to take

resource management one step further by creating invoices against commitments associated with billable activities. Account configuration steps, user and administrative tasks can be referenced below. Use these links to help you understand and work with time tracking.

User Tasks

- [Submit Time Sheets](#)
- [View Active Workflows](#)

Administrative Tasks

- [Review/Approve Time Sheets](#)
- [Approve Time Sheet Invoices \(Cost Int.\)](#)
- [Run Time Tracking Reports](#)

Related Topics:

- [About Managing Time Tracking](#)

[Access Manage \(Projects\) Bill Rates Page](#)

[To access Project Bill Rates page](#)

1. Click the **Projects** Tab from the Top Navigation menu.
2. Choose a project from the **All Projects** menu.
3. From the Project Menu, click **Manage Bill Rates**.
The Manage (Project) Bill Rates page is displayed.

Related Topics:

- [About Time Tracking](#)
- [Manage Project Bill Rates](#)
- [Review/Approve Time Sheets](#)

[Access Submitted Time Sheets](#)

[To access a submitted time sheet](#)

1. Click the Time Sheet Tab from the Top Navigation menu.
The Time Sheets page is displayed.
2. From the **Your Time Sheet** or the **Employee Time Sheets** tab, filter for the desired time sheet and then select it from the table below.
The Time Sheet for [User] page is displayed.

[Submit Time Sheets](#)

Time sheets can be submitted by anyone with Create Time Sheets permissions.

[To submit a time sheet](#)

1. Click the **Time Sheet** Tab from the Top Navigation menu.
The Time Sheets page displays.
2. If you're able to approve time sheets, two tabs appear (Your Time Sheet and Employee Time Sheets). If not, click **Add Time**.
3. If you are in multiple roles, the **Role** drop-down menu appears. Choose the role for which you are submitting the time sheet.
4. Click the pencil icon in the **Project** column to choose the project.
5. Click the **Activity** drop-down menu to make a selection.

Note: Billable activities are only enabled for projects that have been marked as billable and have a bill rate associated with them. If you're unable to access billable activity, ask your account administrator to check your bill rate settings.

6. If you chose a billable task with associated commitments, you're able choose a commitment from the **Commitment Details** column to track your time against.
7. Enter time spent for each applicable day of the week.
8. *Optional:* Take any of the following actions:
 - Enter a note by clicking the **Note** icon next to each cell.
 - Attach Documents, Forms or Processes.
9. Save the time sheet for later
—Or—
Click **Submit** to route it for review and approval.

View Active Workflows

After a time sheet is submitted, it is routed to one or more parties for approval based on the workflow configured for that submission. You can view the active workflow to see in which step of the process the time sheet is in.

To view the active workflow

1. Click the Time Sheet Tab from the Top Navigation menu.
The Time Sheets page displays.
2. If available, click the **Your Time Sheets** tab and filter for the submitted time sheet(s).
3. Click the link of the time sheet.
4. Click the **Show History** link.
The Routing History page displays.
5. Click **Show Workflow**.
A secondary Graphical View window appears. The current step of the workflow is highlighted with a blue border.

Related Topics:

- [About Time Tracking](#)
- [Submit Time Sheets](#)

Manage Project Bill Rates

This task can be completed by users with Manage Project Bill Rates permissions.

Default bill rates are established at the account level on the Manage Membership page, however the Manage Bill Rates page in Project Details gives you a convenient, secondary way of modifying user bill rates for particular projects. Changes made here also update account settings and vice versa.

To set Project Bill Rates

1. Go to the Manage Bill Rates page.
For instructions see [Access Manage \(Project\) Bill Rates Page](#).
2. For the desired user(s) select the Billable check box.
3. *Optional:* To use the default rate select the **Default Bill Rate** check box.
The default rate displays in the **Bill Rate Per Hour** column.
4. If you are not using the default rate, enter an hourly rate in the **Bill Rate Per Hour** column.
5. Click **Save**.

Related Topics:

- [Manage \(Project\) Bill Rates Page Overview](#)
- [Manage Account Bill Rates](#)
- [About Time Tracking](#)

Manage Project Bill Rates

This task can be completed by users with Manage Project Bill Rates permissions.

Default bill rates are established at the account level on the Manage Membership page, however the Manage Bill Rates page in Project Details gives you a convenient, secondary way of modifying user bill rates for particular projects. Changes made here also update account settings and vice versa.

To set Project Bill Rates

1. Go to the Manage Bill Rates page.
For instructions see [Access Manage \(Project\) Bill Rates Page](#).
2. For the desired user(s) select the Billable check box.
3. *Optional:* To use the default rate select the **Default Bill Rate** check box.
The default rate displays in the **Bill Rate Per Hour** column.
4. If you are not using the default rate, enter an hourly rate in the **Bill Rate Per Hour** column.
5. Click **Save**.

Related Topics:

- Manage (Project) Bill Rates Page Overview
- Manage Account Bill Rates
- About Time Tracking

Review/Approve Time Sheets

The route that time sheets take for review and approval are based on the workflow assigned to the role/user that is submitting the time sheet. You must be an actor on the review step of the workflow to take action on the time sheet, i.e. review/approve/reject the time sheet.

To review time sheets

1. Click the **Time Tracking** tab from the Top Navigation menu.
2. From the **Employee Time Sheets** tab, filter for the time sheets you wish to review. By default, all time sheets in your court will appear in the table toward the bottom of this page.
3. Click the **Time Sheet Dates** link for the one you wish to review.
The Time Sheet for (User) page displays.

4. *Optional:* You can:
 - View the history of the workflow
 - View current actors
 - Override workflow
 - Add Comments, documents, forms or processes.

For field descriptions on this page, see Time Sheets Page Overview.

5. Review the time sheet and then take an action by choosing an option from the **Please select an action** drop-down menu located in the upper right corner of the page.

Note: Depending on Workflow Details, choosing an action (step 6) may automatically route the process to the next step.

6. If necessary, click **Take Action**.
The Time Sheet is routed to the next step in the process.

Related Topics:

- About Workflows
- About Time Tracking

Override Time Sheet Workflows

This task can be completed by Account Administrators. Overriding a workflow allows you to bypass the current step of the process, add additional step actors to the current step, and/or change the current time sheet's status.

To override workflows

1. Go to the submitted time sheet.
For instructions, see Access Submitted Time Sheets.

2. Click the **Workflow Override** link located in the upper right corner of the page.
The Time Sheet for [User] - Override page displays.
3. Complete all necessary fields.
For a description of each field, see Workflow Override (Time Sheet) Page Overview.
4. Click **Override**.

Approve Time Sheet Invoices

If time tracking is integrated with Cost and the workflow is configured to generate invoices, a draft invoice will automatically be created when a time sheet with billable tasks is approved. Activities that include commitment items produce a draft commitment invoice and those that do not have commitments produce a general invoice in draft status. These draft invoices can be found in the Cost module in Unfinished Drafts or by filtering for them on the Actual Costs page.

To review/approve time sheet invoices

1. Click the Cost tab from the Top Navigation menu.
2. Click the Unfinished Drafts link in the upper right corner of the page.
—Or—
Go to the Project Actual Costs page. For instructions, see Access Actual Costs Page.
3. Filter for and select the appropriate draft commitment or general Invoice.
The Invoice Details page display.
4. Click **Approve**.
5. Click the current date link to insert today's date into the field, or enter a different date in the **Approval Date** field.
6. Click **Yes, Approve Commitment**.
The newly added commitment is updated on the Project Cost Summary and Commitments Quick Cost Summary.

Related Topics:

- About Time Tracking
- Integrate Time Tracking with Cost
- Create Workflows (Time Tracking)

Run Time Tracking Reports

Time tracking reports allow you to see time sheet details such as the initiator and hours submitted per week.

To run time tracking reports

1. Click the Reports tab on the Top Navigation menu.
2. Click **Add Report**.
3. From the drop-down menu, select Time Tracking, and then click **Next**.
4. Choose the type of report you wish to run, and then click **Next**.

- **Tabular:** Provides simple listing of data with no subtotals
 - **Summary:** Provides the option to sort and subtotal data
 - **Matrix:** Summarizes data in a table and allows you to group both rows and columns
5. Select the columns of data you wish to include in your report.
Note that there are some default selections.
 6. Choose how you wish to summarize the information you selected in the previous step, and then click **Next**.
 7. Choose the order of your columns and the order by which to sort them, and then click **Next**.
 8. If you chose Summary or Matrix reports you are able to choose the information by which to group the rows (Summary) or columns (Matrix) in your report.
 9. If you wish, specify filters to include or exclude specific types of information.
 10. Click **Run Report**.

Manage (Project) Bill Rates Page Overview

This page allows those with Manage Project Bill Rates permission to establish a user's bill rate for the project. Default rates are established at the account level by account administrators. Bill rates are required for billable Time Tracking activities. They allow you to set hourly rates for project participants in order to more accurately track project costs. When a time sheet is entered and a commitment is selected, the pay out calculations will be determined based on the bill rate. Bill rates can be set here as well as on the Manage Membership page.

For instructions, see Set Project Bill Rates.

Fields and Buttons

The fields and buttons on this page are:

- **User:** This columns lists project participants.
- **Billable:** Select this check box to make the user billable for the selected project. This will allow you to track their time against billable activities and associated commitments and ultimately generate a invoice for their time. You will have to set a bill rate by choosing the Default Bill Rate check box or entering a specific one in the Bill Rate Per Hour text box.
- **Default Bill Rate:** Select to utilize this user's default bill rate on the project. If a default has not been set for them at the account level, you're able to define it here and it will update the account setting as well. To learn more, see Manage Account Bill Rates.
- **Bill Rate Per Hour:** This field will display the user's default bill rate if the Default Bill Rate check box is selected and one is established at the account level. Also, if the user is marked as billable and a default rate is not in use, this text box will be editable for you to enter a rate for this particular project.

Time Sheets Page

The e-Builder Time Tracking module allows your employees and/ or consultants to track their time against e-Builder projects and/ or activity codes. They can then submit their time sheets to be routed to the correct approver(s) (i.e. management) based on the associating Time Tracking workflow configured for the initiator s username or role. For more about Time Tracking Workflows, see Workflow within Admin Tools in Setup.

The following procedural instructions will also guide you through working with time sheets:

User Tasks

- Submit Time Sheets
- View Active Workflows

Administrative Tasks

- Review/Approve Time Sheets
- Approve Time Sheet Invoices (Cost Int.)
- Run Time Tracking Reports

Fields and Buttons

The fields and buttons located on this page are:

- **Add As Contact:** This button appears only if the user is not yet an e-Builder contact. Click to add the user as a contact. If the company name is not recognized you will be prompted to save it.
- **Manage Membership:** Click to open the Manage Membership page where you will be able to set the user's project membership; validate their account and project roles; and determine the project level template to add them to.
- **Edit:** Click to edit the details of the user's account record.
- **Cancel:** Click to return to the Manage Users page.

Member Profile

- **First Name:** Displays the user's first name.
- **Last Name:** Displays the user's last name.
- **Username:** Displays the user's username used to log in to e-Builder.
- **Last Login:** Displays the date the user last logged in to e-Builder Enterprise.
- **License Type:** Displays the user's license type. Options are as follows:
- **Contracted License:** Contracted licenses are the licenses included in your e-Builder subscription. If your subscription includes 50 user licenses, you have 50 contracted licenses that may be assigned to users to give access to your account.
- **Individual License:** An individual license is assigned to a user that is required to purchase their license prior to gaining access to your e-Builder account. They will be taken through a purchase process the first time they log in during which they will be able to purchase their license using a credit card. For more information, see Individual License Manager.
- **Company:** Displays the user's company affiliation.
- **Email Address:** Displays the user's email address.
- **Access Expires:** If applicable, displays the date the account is set to expire.
- **Hide in Global Directory:** A check mark in this field indicates that this user is hidden in the global directory, which ensures they cannot be added to multiple accounts. When adding existing users from another account, this person will not be listed in the list of available users.
- **Access to documents only:** A check mark in this field indicates that this user only has access to documents and not any other e-Builder module.

Business Information

- **Type of Business:** Displays the type of business the user is affiliated with. Options may include any of the following:
 - Owner/ Owner's Rep
 - Construction Manager
 - Architect/ Engineer
 - General Contractor/ Design Builder
 - Specialty Contractor
 - Consultant
 - Supplier
 - Other
- **Department:** Displays the name of the department the user belongs to.
- **P.O. Box/Suite:** Displays the user's P.O. Box or Suite address.
- **State/Province:** Displays the user's state or province
- **Postal/ Zip Code:** Displays the zip code.

Your Time Sheet Page

This page allows those with Create Time Sheet permission to submit and view time sheets. For instructions, see Submit Time Sheets.

Fields and Buttons

The fields and buttons located on this page are:

View Mode

The fields in this section are only visible when viewing a time sheet that has already been submitted.

- **Workflow Override:** Available to account admins on submitted time sheets. Click to bypass the current step and/or add additional step actors to the current step, and/or override the current time sheet's status to another status. You can also chose to not send notifications related to these updates, and add notes when desired. For instructions, see Override Workflows.
- **Show History:** Click to see all past steps of the selected time sheet. The Routing History page appears and from there you are also able to view the active workflow and every actor that took action on each of the steps.
- **Current Actors:** Click to view all possible actors of the current step.
- **Accept/Decline:** These buttons appear if you are a step actor (i.e. time sheet approver) and there are multiple people in this role which can take action on the time sheet. Click Accept to take responsibility and take an action, this will relinquish others in this role from this responsibility. Click Decline to remove yourself as a responsible party. If all others in the role decline before you do, the last person left in the role will not have the Accept/ Decline option and this task will remain in their court until action is taken.

- **Please Take Action drop-down menu:** Click the drop-down arrow to select an action to take.

Note: Depending on workflow configurations, simply choosing an action from this drop-down menu will submit the action and move the workflow to the next step. See Add/Edit Workflow Properties for more information.
- **Take Action:** Click to take the selected action and move the workflow to the next step.

Note: This button may or may not be visible depending on workflow configurations. If not visible, simply choosing the action will submit the workflow. See Add/Edit Workflow Properties for more information.
- **Delegate:** This button is visible to Account Administrators. Click to delegate steps in the workflow to another user. A notification will be sent to the recipient letting them know time sheet was delegated to them. This user can then choose to accept or decline full authority. If they accept it then it will move this time sheet into their court. If they decline then a notification will be sent back to the original actor who delegated the time sheet and it will remain in their court.
- **Cancel:** Click to discard changes and return to the Time Sheets page.

Edit Mode

These fields are available while inputting the time sheet and may also appear in View Mode.

- **Return to Time Sheets:** Click to return to the Time Sheets page and filter for specific time sheets.
- **Role:** This drop-down menu displays only if you are in multiple roles with the permissions to submit time sheets. Choose the role for which you are submitting this particular sheet. The selected role determines the projects, activities and workflow that is enabled for the time sheet.
- **Add Row:** Click to add an addition row to add time to.
- **Calendar picker:** Click the calendar picker icon to jump to another time sheet work week.
- **Left navigation arrow:** When viewing your own time sheets the left navigation arrow moves you to the previous work week. When viewing employee time sheets the left navigation arrow moves you to the previous employee time sheet in the filtered list on the Employee Time Sheets tab.
- **Right navigation arrow:** When viewing your own time sheets the right navigation arrow moves you to the next work week. When viewing employee time sheets the right navigation arrow moves you to the next employee time sheet in the filtered list on the Employee Time Sheets tab.
- **Project:** Click to chose a project to track time to. In view mode, this field displays the selected project.
- **Activity:** Click to choose an activity. If billable activities are disabled, ensure that the administrator has bill rates assigned to you. See Manage Project Bill Rates for more information.
- **Commitment Details:** This column appears if a billable activity is selected which has commitments associated with it. Choose the appropriate commitment to track time against. In View mode, the selected commitment is displayed.
- **Days of the Week/ Dates:** Enter the amount of time spent on the respective activity. In View mode the cells list of amount of time entered for each activity.
- **Total:** Displays the total amount of time spent on the respective activity for the selected week.

- **Payout:** This column is only visible to users with View Payout permissions and when a billable activity is selected. It contains the sum of the hours entered multiplied by the user's bill rate.
- **Add to Favorites:** Click the pin icon to add that project and/ or activity combination as a favorite. This will result in that project and/ or activity to be defaulted in future time sheets. To remove this row as a favorite you can deselect the pin icon in the current, or any future time sheet, to have it no longer defaulted into your future time sheets.

Note: Only new, draft and rejected (to the current actor) time sheets will display the pin icon.

Workflow Override (Time Sheet) Page

Account Administrators will use this page to override a workflow step, add actors or change the status of a process.

For instructions, see Override Time Sheet Workflows.

Fields and Buttons

The fields and buttons on this page are:

- **Return to Time Sheets:** Click to return to the Time Sheets page and filter for specific time sheets.
- **Lookup:** Click to view the workflow. The current step is indicated by a blue boarder.
- **Step:** Lists the name of the current step. If applicable, you re able to move the process to another step.
- **Step Actors:** Lists all possible step actors.
- **Add Actors:** Allows you to add additional actors to this step.
- **Do Not Send Notifications:** Select to make changes without sending a notification to any of the actors.
- **Status:** Click to choose the status of the process.
- **Comment:** Use this field to enter a comment, which will appear on the Comments tab of the time sheet.
- **Override:** Click to submit changes and complete the override.
- **Back:** Click to discard changes and return to the Time Sheet page.