User Training Guide – 2013

October 2013

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Active X Files

For the optimal use of e-Builder there are two Active X files that need to be installed on your computer. These Active X files will need to be loaded if you want to use the Multi-File Upload and Redline/View tools. They will need to be loaded only once for their continued use. If any version updates are made to these files that will require reinstallation in the future, you will be notified by the e-Builder Support or Product Management teams.

Multi-File Upload Tool

The multi-file upload tool allows the user to import multiple files simultaneously into a particular folder (assuming necessary permissions are granted to the user). This powerful function of e-Builder saves the user significant time over traditional single-file "attachment" methods.

Redline/View Tool

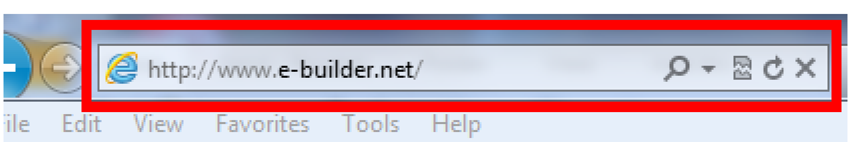
Also within the document module, users can redline documents and view drawing files without the need to have an AutoCAD viewer installed on the local workstation.

Active X Controls Download

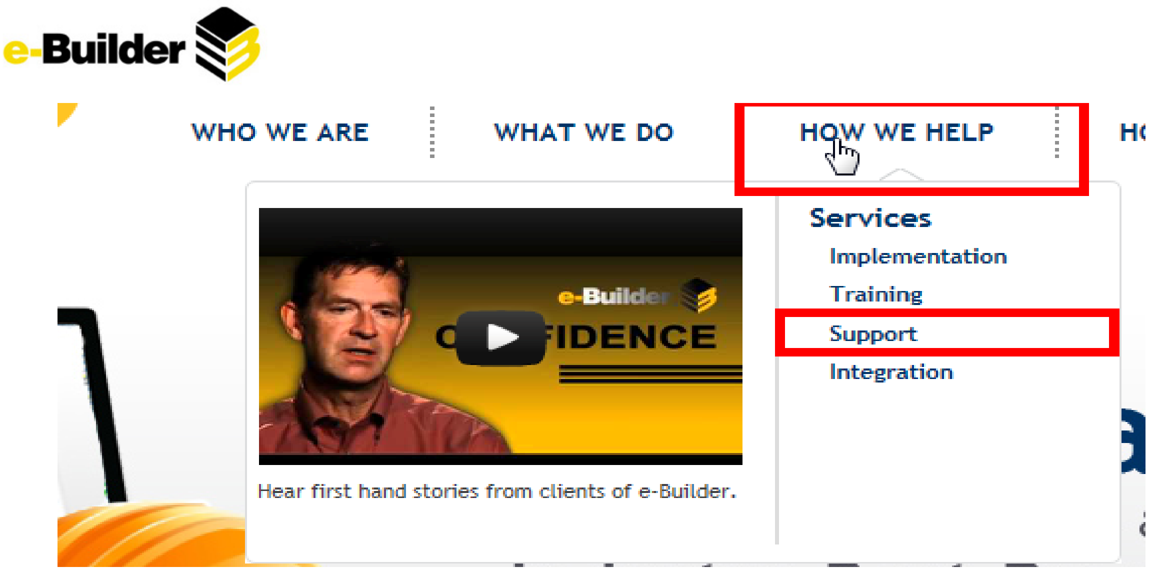
The Active X controls can be downloaded by the user within the application. However, if you require downloading of the Active X controls to the workstation prior to using e-Builder, or if the user does not have Administrator access to the workstation, the Active X controls can be directly downloaded from the e-Builder support page.

Instructions to Download

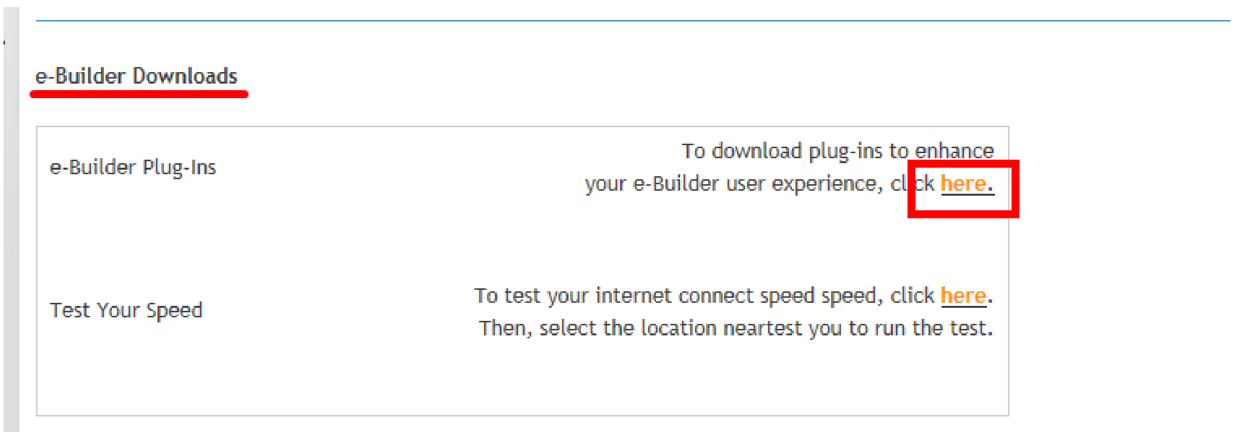
1. *Open Internet Explorer and navigate to the e-Builder website by typing the following link in the address bar:* www.e-Builder.net



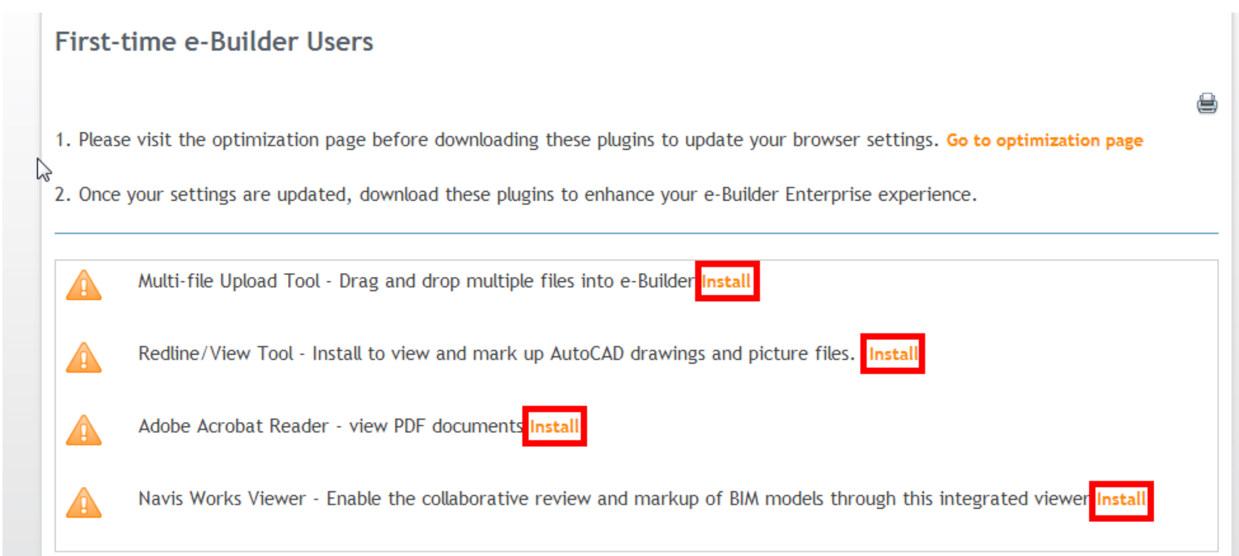
2. *Hover mouse over the **How We Help** tab to display drop down menu and select **Support.***



3. *Scroll down until you see the "e-Builder Downloads". Then click the hyperlink to the right of the "e-Builder Plug-Ins" section.*



4. *Click **Install** to download desired tool. (It is recommended to download all tools)*



The following will show what each tool looks like before and after installed:

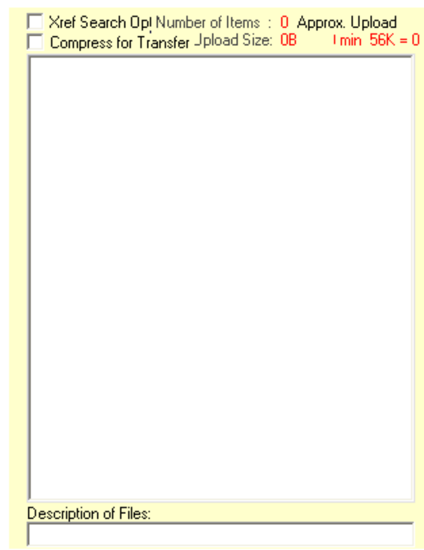
Multi-File Upload in Progress

The Multi-file Upload control will be downloaded and installed automatically. Please be patient as the tool is downloaded and installed. Once installation has successfully completed you should see 2 examples side-by-side of what the tool window looks like.

If this does not occur, check to make sure your IE settings are properly configured. **Click here** to find out more about the configuration settings.

If you still have problems please contact technical support at 888-288-5717.

Before **After**

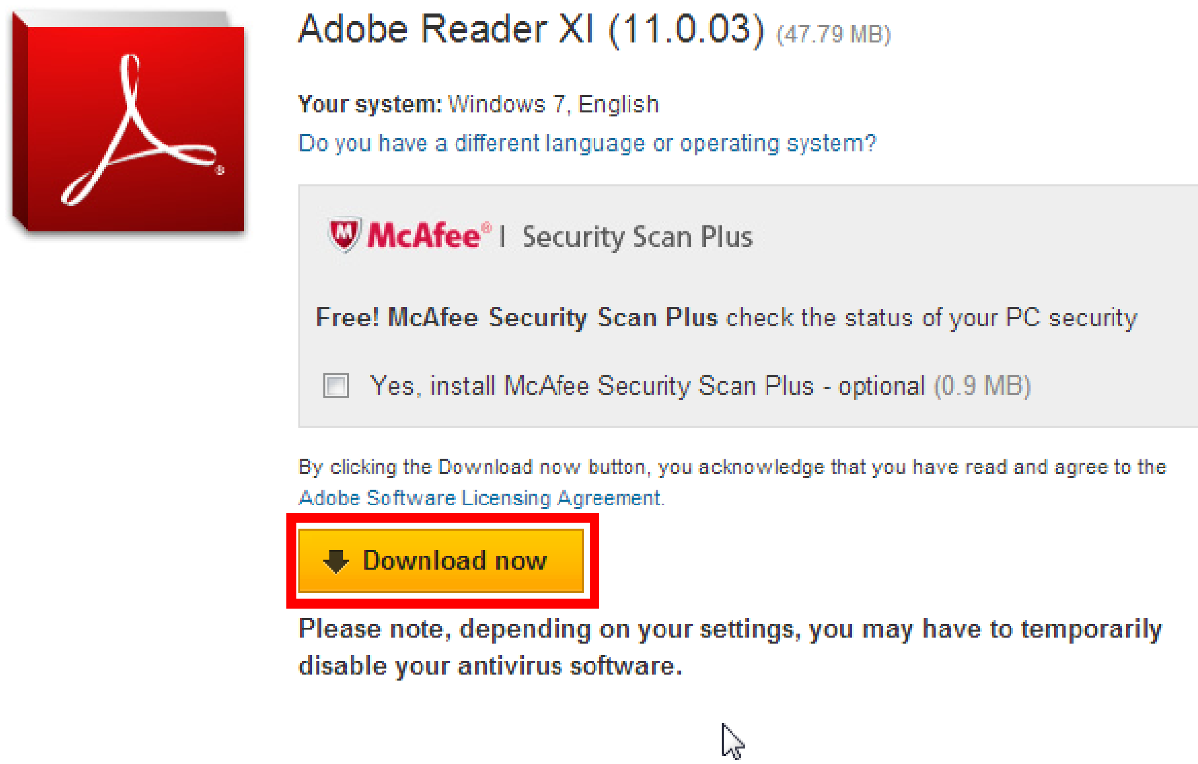


Redline Tool Installation In Progress

The Brava .NET 6.2 installation will begin automatically. This install requires a 2.82 MB download: 8 minutes on a 56 kbps connection, < 1 minute on a 1.5 mbps connection (T1). Depending on your browser setting, you may be prompted to allow the installation of the file.
When install is complete, you should see a sample DWG drawing in the viewer, which you can redline, print, change layer display settings, and more. Please try out the new version and it's tools. If you have trouble, please contact technical support at 888-288-5717.

Click "Download Now" to begin download for Adobe Reader

Adobe Reader download

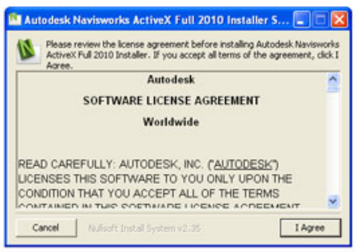


Navis Works Viewer Installation in Progress

The Navis Works Viewer installation will begin automatically. Please be patient as the tool is downloaded and installed - depending on the speed of your Internet connection, this process may take up to 2 minutes.

When you see this window appear - click Install to proceed with the installation process.

You will be prompted to accept the Navis Works Viewer License Agreement.



After accepting the licensing aggreement, installation will continue. Once it completes, this page will need to be refreshed and you will see a 3D image at the bottom of the page. Click here to refresh now.

If this does not occur, check to make sure your IE settings are properly configured. Click here to find out more about the configuration settings. If you still have questions please contact technical support at 888-288-5717.

Follow the prompts and directions on the screen to complete tool downloads. Once complete, the original install screen will show as follows:

First-time e-Builder Users

1. Please visit the optimization page before downloading these plugins to update your browser settings. **Go to optimization page**

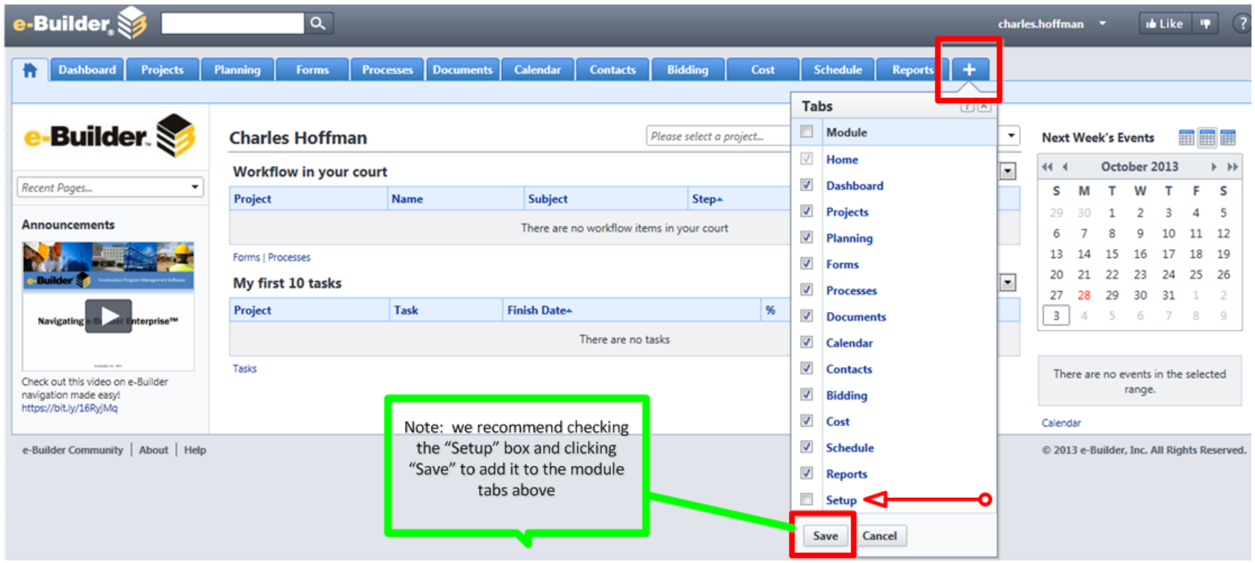
2. Once your settings are updated, download these plugins to enhance your e-Builder Enterprise experience.

- ✔ Multi-file Upload Tool - Drag and drop multiple files into e-Builder
- ✔ Redline/View Tool - Install to view and mark up AutoCAD drawings and picture files.
- ✔ Adobe Acrobat Reader - view PDF documents
- ✔ Navis Works Viewer - Enable the collaborative review and markup of BIM models through this integrated viewer

My Setup

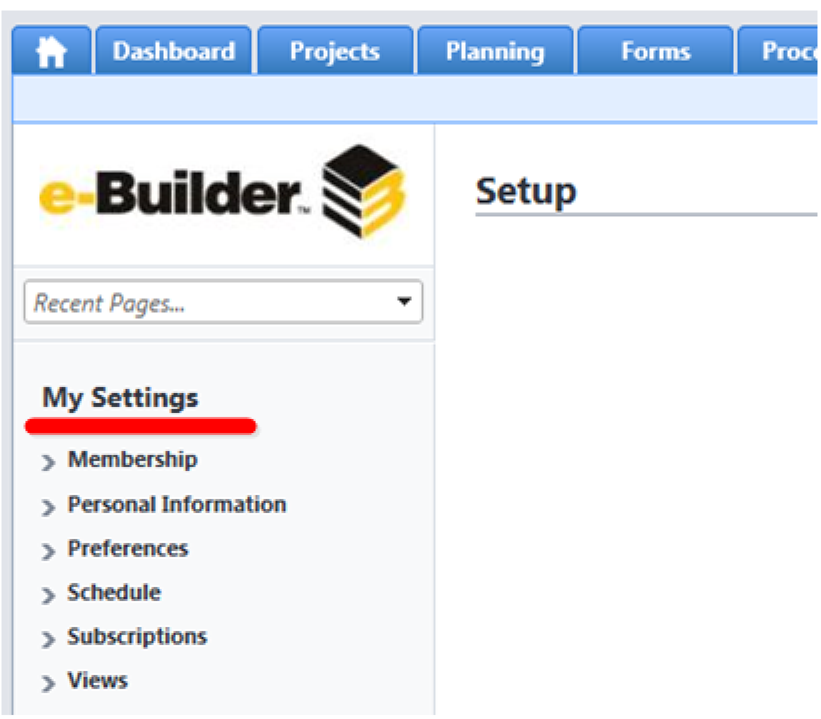
My Setup allows you to reference and customize information about your personal e-Builder account information and settings, including contact information, subscription notifications and personal settings such as your custom views and/or time zone settings.

1. *To access My Setup, navigate to the "+" symbol and click **Setup** as shown below.*



Configure Your Settings

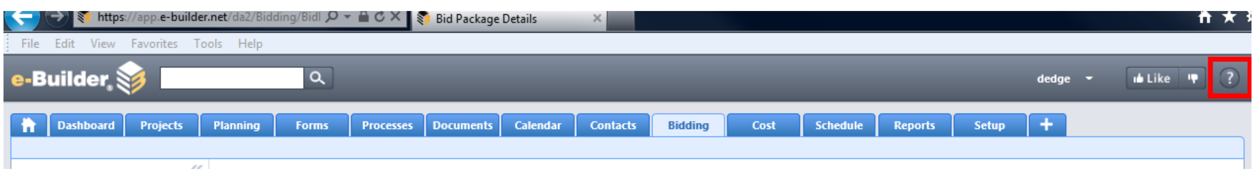
Use the menu on the left to customize settings within Setup.

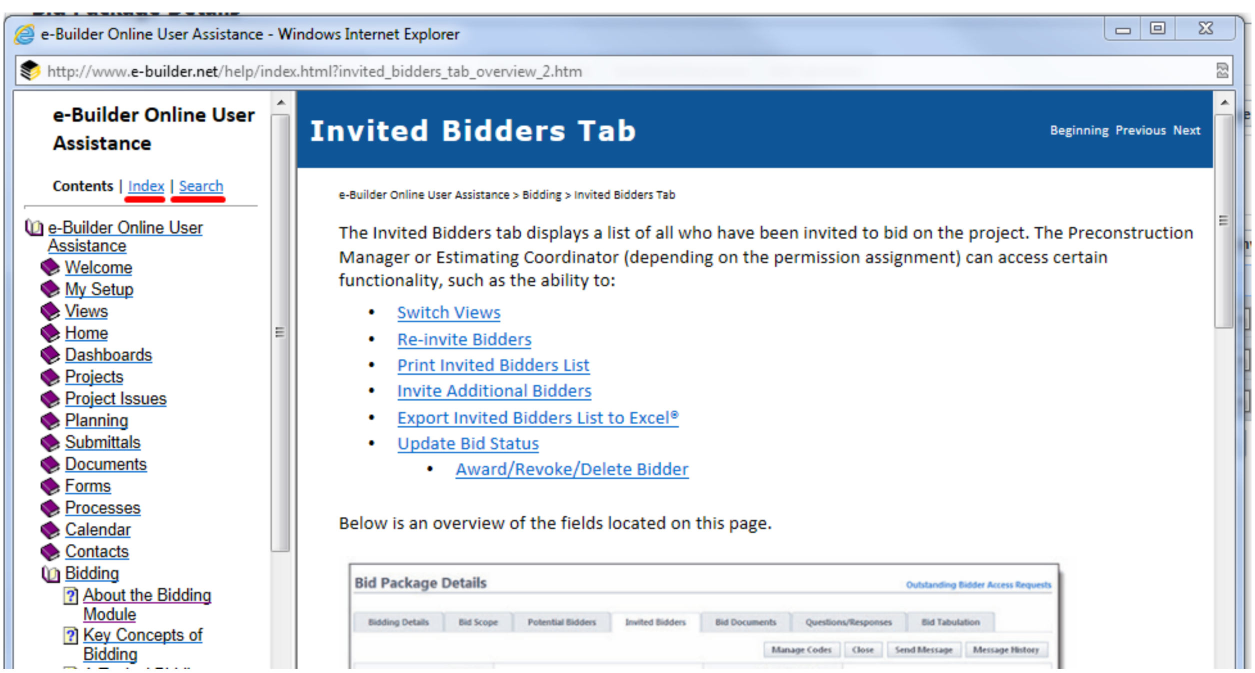


- *Membership: The membership link allows you to view what roles or projects you are associated with.*
- *Personal Information: Here, the user can update profile information and change current password.*
- *Preferences: Here, the user can specify notification and interface settings. (Note: Default values are already in place and normally sufficient)*
  - *Notification Settings: Check/Uncheck appropriate check boxes to alter which e-Builder actions/occurrences notify the user.*
  - *Interface Settings: The Interface link allows users to change the default settings for items such as folders, subfolders, automatic spell check, single sign-on etc.*
- *Schedule: Manage any schedule templates here, if applicable.*
- *Subscriptions: The subscriptions allow users to set up automatic delivery of reports.*
- *Views: The Views link allows users to view what/how information is displayed under each module.*

Using the Help Function

For more information regarding any e-Builder functions, refer to the Help bubble in the top right corner. The Help function will automatically jump to the relevant information based on your screen. Use the search/index function to search for information regarding any questions or problems you are confronted with.

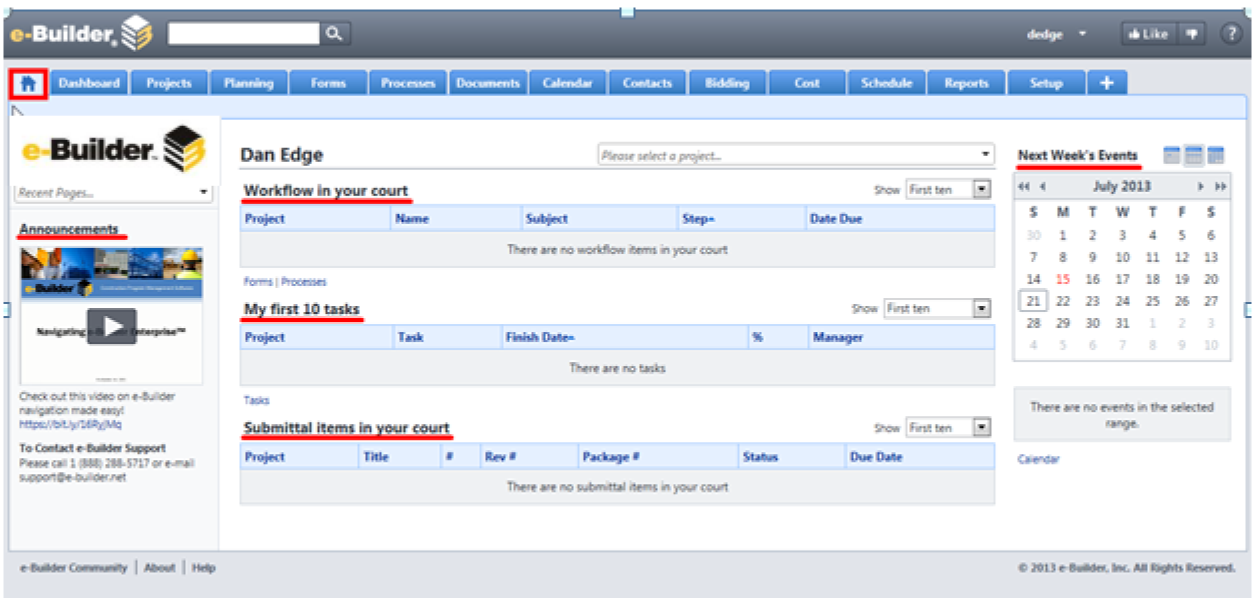




Home Module

The e-Builder Home tab provides one centralized place to see important and upcoming items across all modules in e-Builder. Those items include a summary of upcoming events, workflows in your court, items pending approvals, tasks that you have been assigned to and announcements.

The e-Builder Home module will be the first screen displayed when you log in to the system. You can also access it by clicking on the Home tab at the top of the screen.



- *Announcements: In the left column, the user will see any important announcements made by the e-Builder Administrators.*

- *Workflow in your Court: This is where the user will see any items that he/she is required to take action on. (See Processes and Forms to gain more information on the data displayed here)*

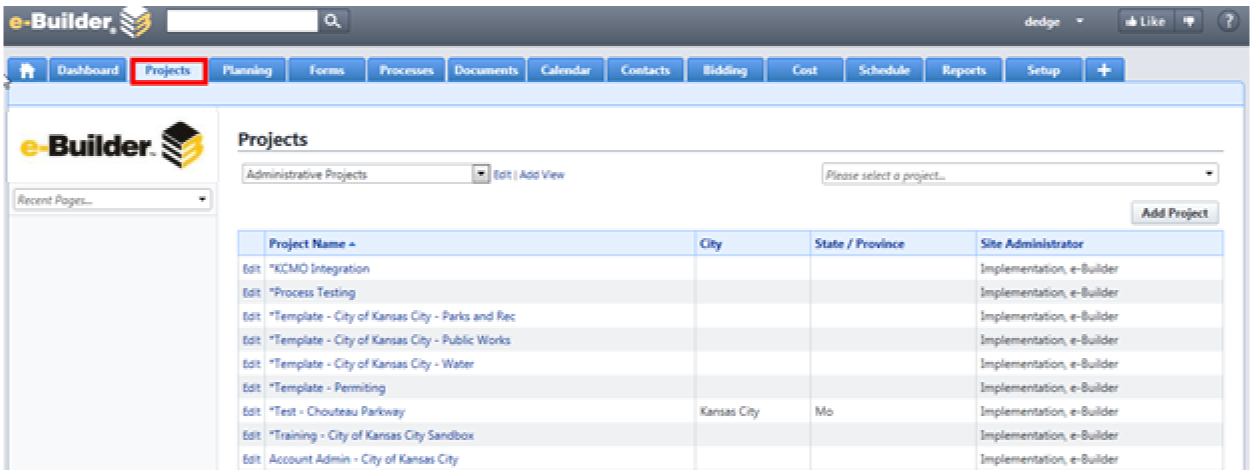
- *My First 10 Tasks: Any tasks that the user is responsible for (see Schedule) will appear here in order of date due.*

- *Submittal Items in your Court: If applicable, any submittal items that need user attention will appear here.*

- *Next Week's Events: On the right column, the user will see any calendar events that he/she is invited to attend.*

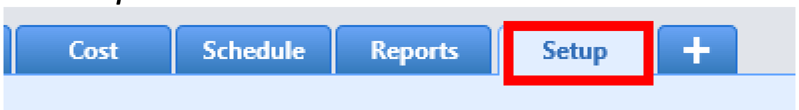
Project Module

In e-Builder's Projects Module you can view, access, and update the basic project information for your projects. This includes key information such as the project address, status, custom fields, workflow settings, and calendar settings. You can produce meaningful Views, Reports, and Dashboards based on data you and your team wishes to track. The user will only be able to see projects that he/she is a member of.

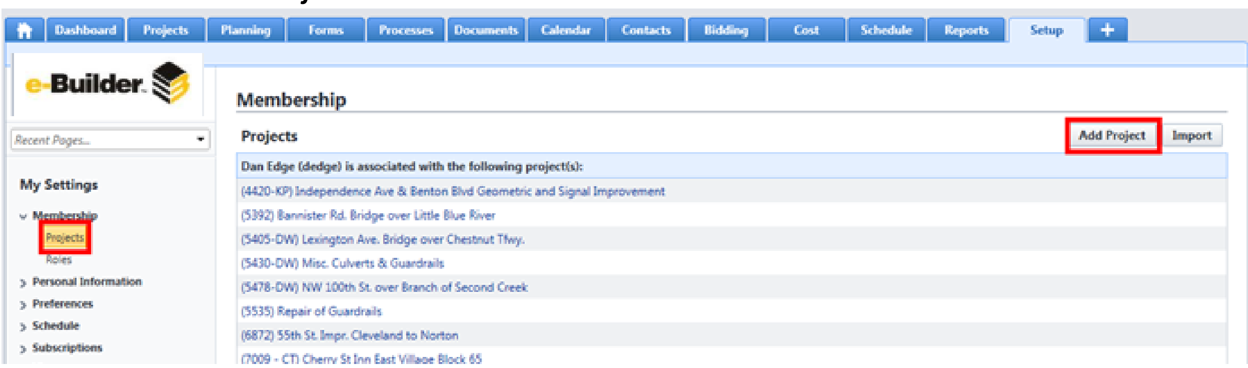


Adding a New Project

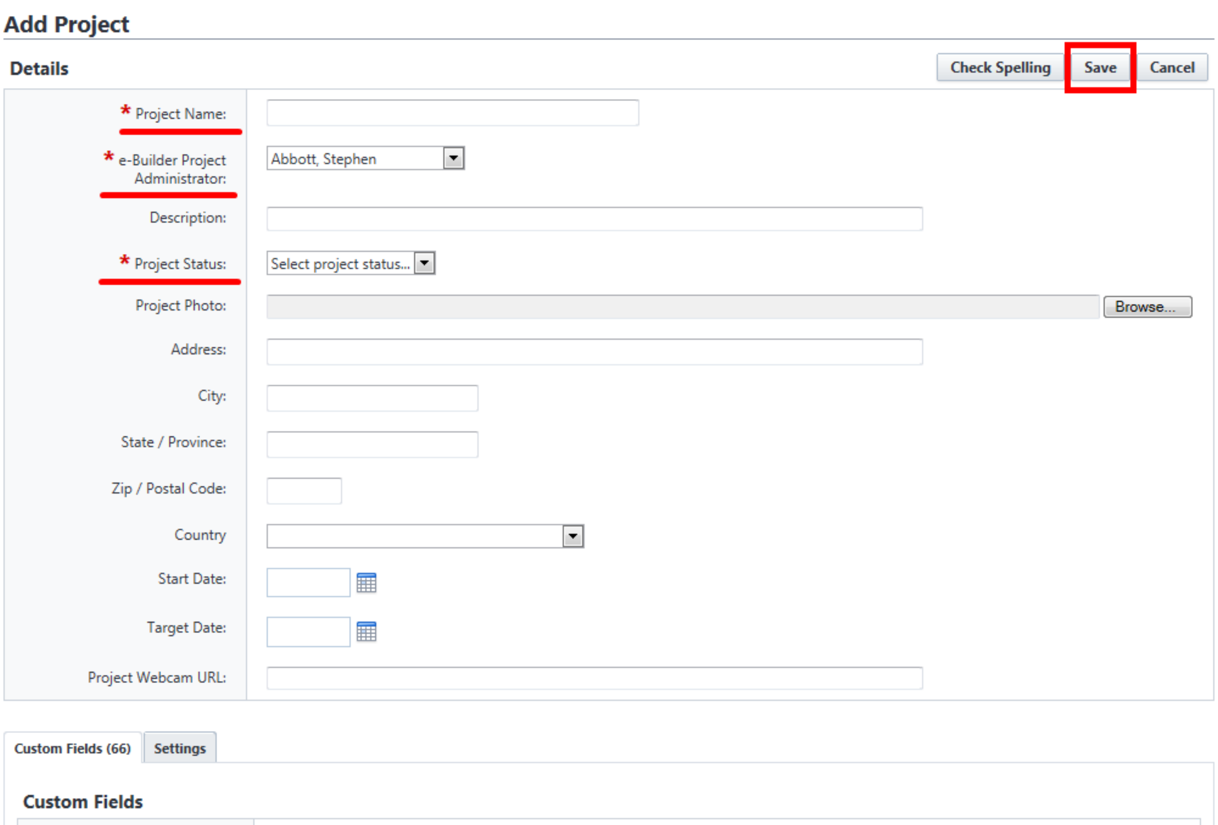
1. *Go to **Setup.***



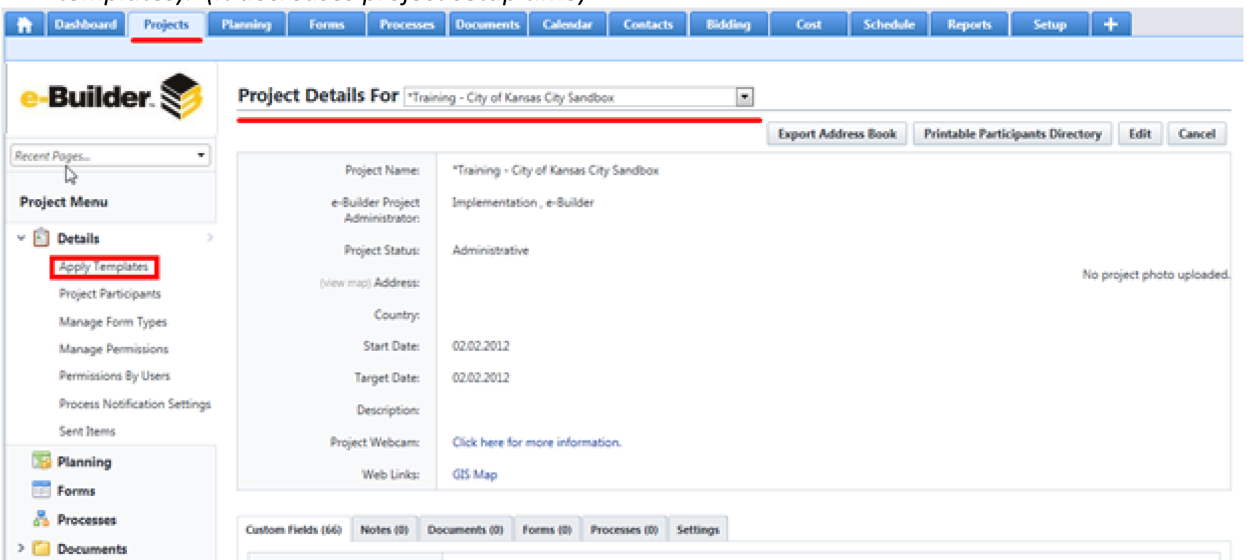
2. *Under My Setup click **Membership.***
3. *Click **Projects**, a list of projects you are associated with will appear.*
4. *Click **Add Project.***



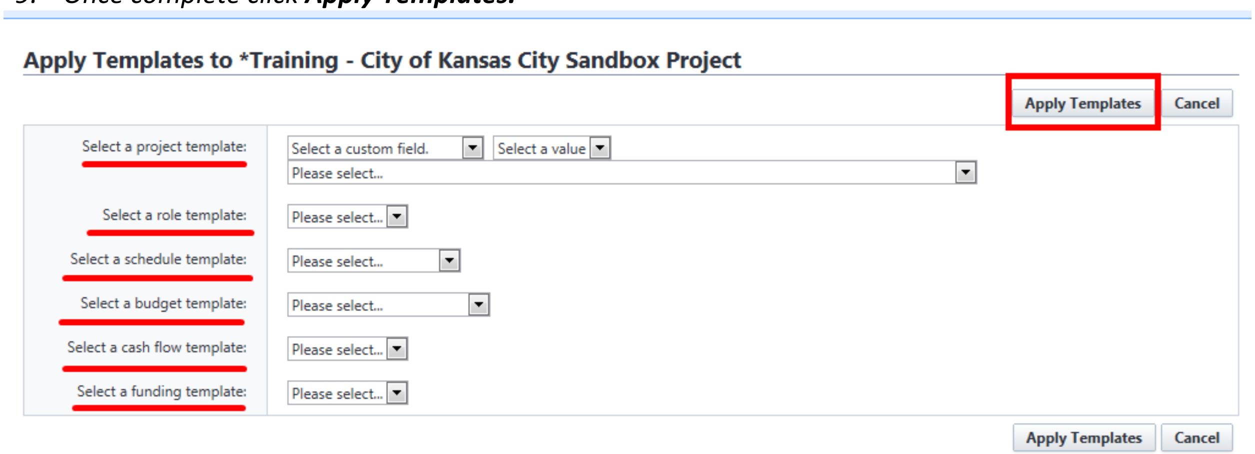
5. *Enter the "Details" information and any relevant "Custom Fields" information. (required fields are noted in red)*
6. *Once all fields are entered, click **Save**. You will now be in the Project Module.*



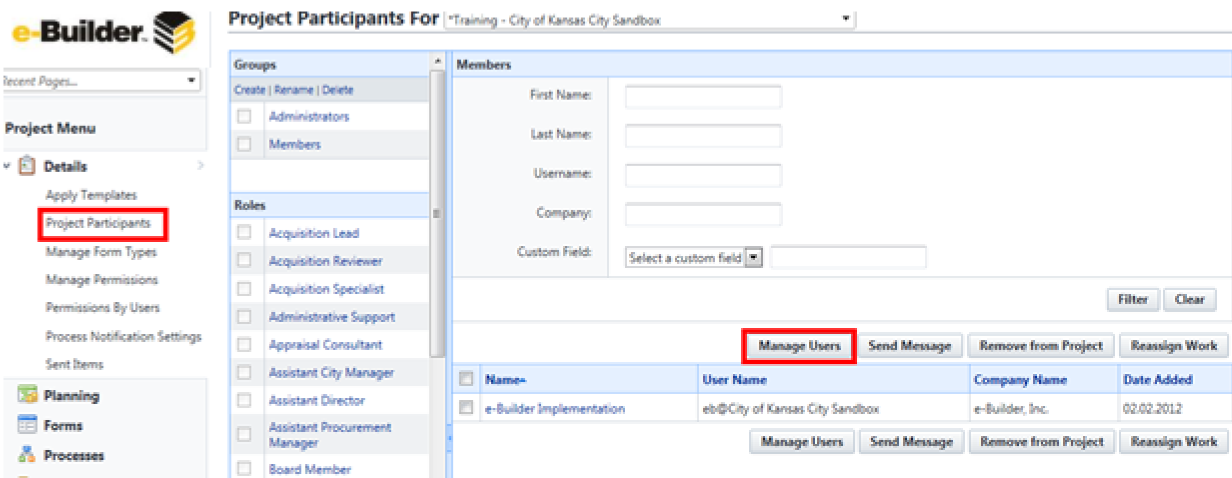
7. *Under the Project Details menu on the left, click* ***Apply Templates****. This is where the user will allow new project to inherit properties and characteristics from past projects (or designated project templates). (It decreases project setup time)*



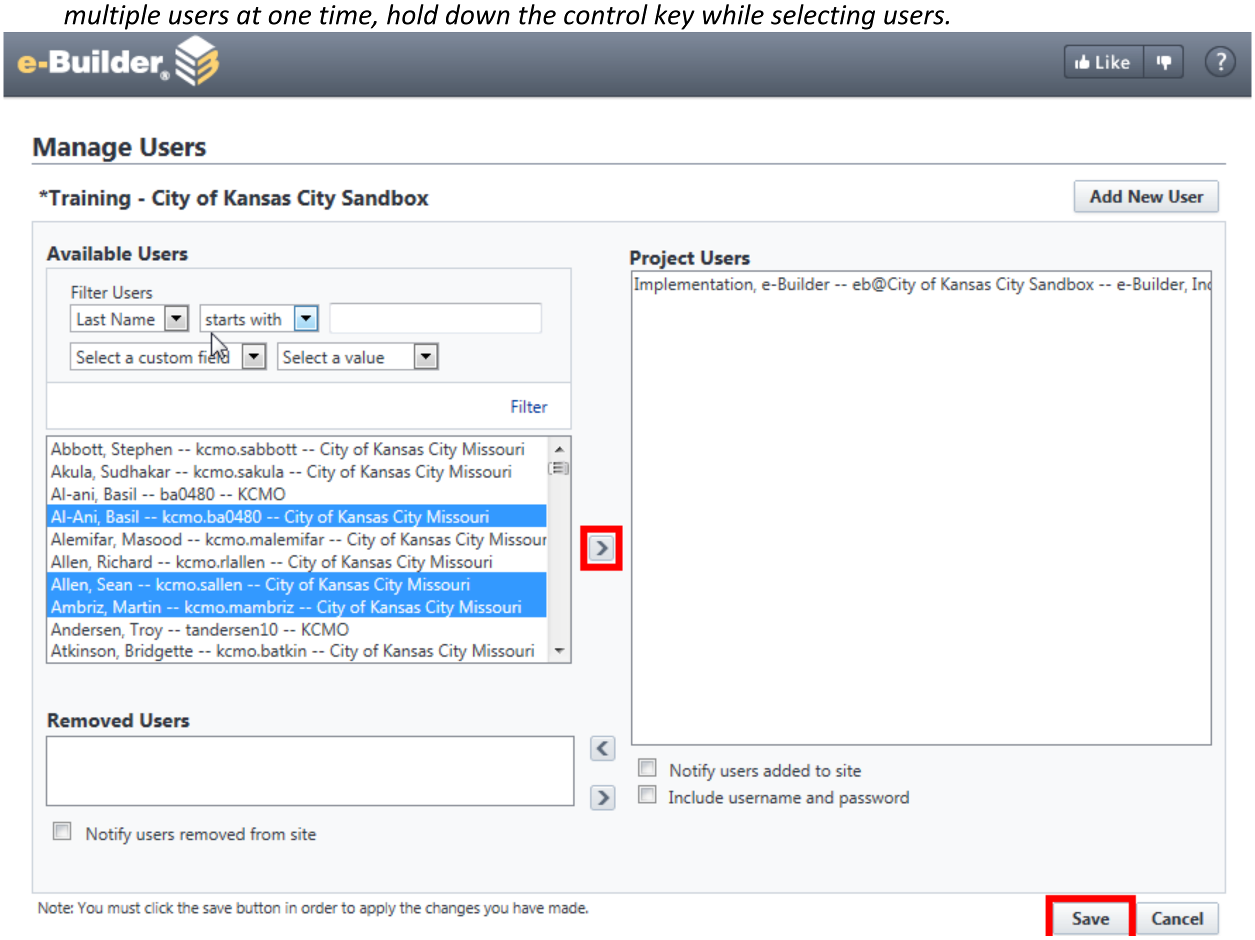
8. *Select a project, role, schedule, budget, cash flow, and funding template where applicable.*
9. *Once complete click* ***Apply Templates.***



10. *Under the Project Menu click on the* ***Project Participants*** *link.*



11. Click ***Manage Users.***
12. *Select the users you want to add to the project by highlighting the names on the left hand side of your screen. Use the arrow key to move them over to the right hand side of the screen. To add multiple users at one time, hold down the control key while selecting users.*



13. *If you would like to notify the users that they have been added to the project (email notification) click the Notify users added to site. If you would like to provide the user with their user name and password, check the Include username and password box (username and password included in*

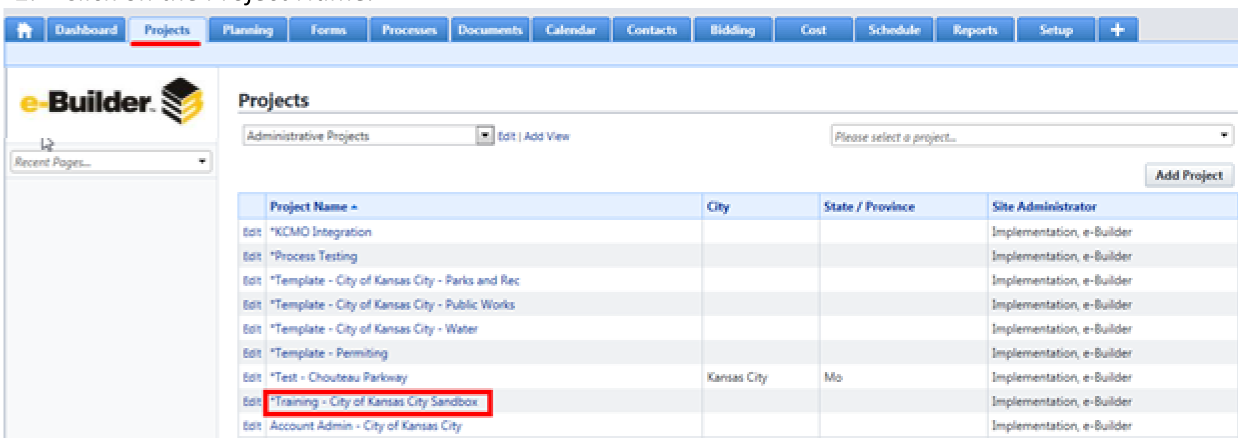
email). It is recommended to notify users and provide username and password if not already in e-Builder system.

14. *Click **Save.***

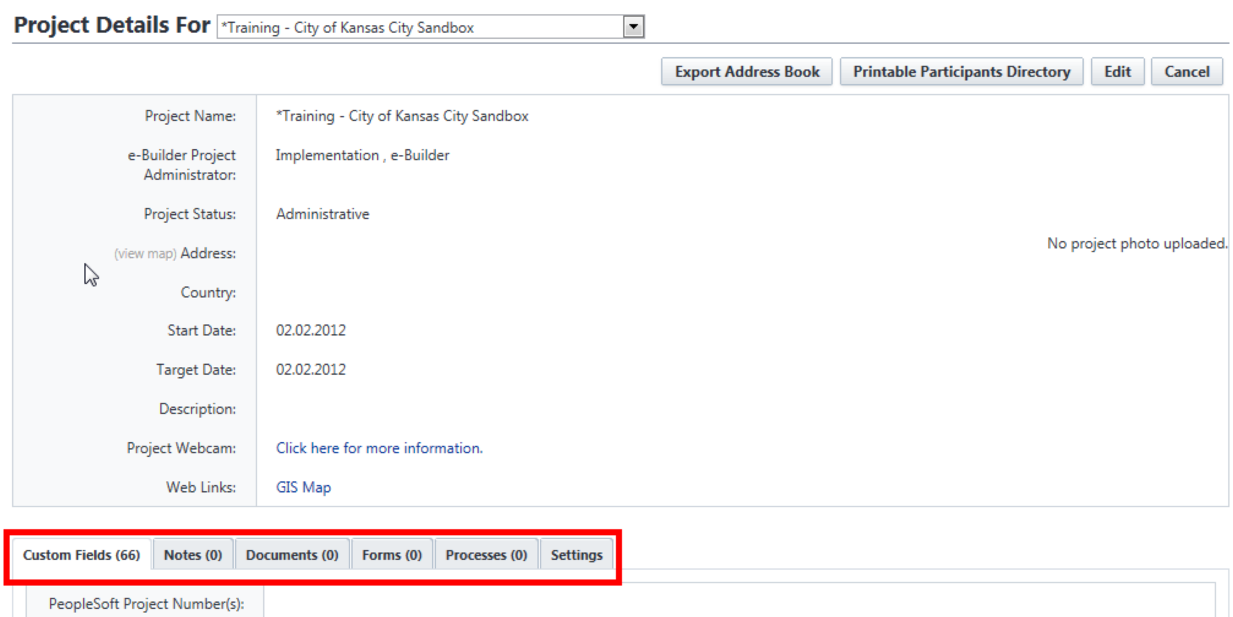
Note: If you do not have the permission to add a project, contact your e-Builder Administrator

Accessing Your Projects

1. *Click the **Projects** tab at the top of your screen. A list of projects that you have access to will appear.*
2. *Click on the Project Name.*

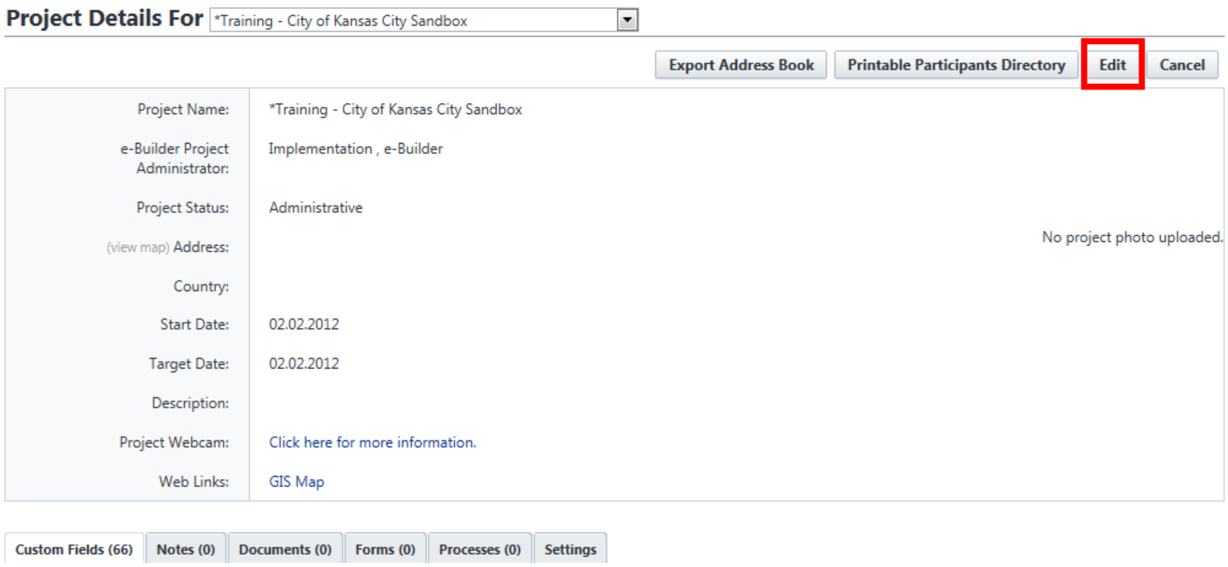


3. *Here you can see the project information as well as access any notes, documents, forms, processes, or settings by clicking the respective tab.*

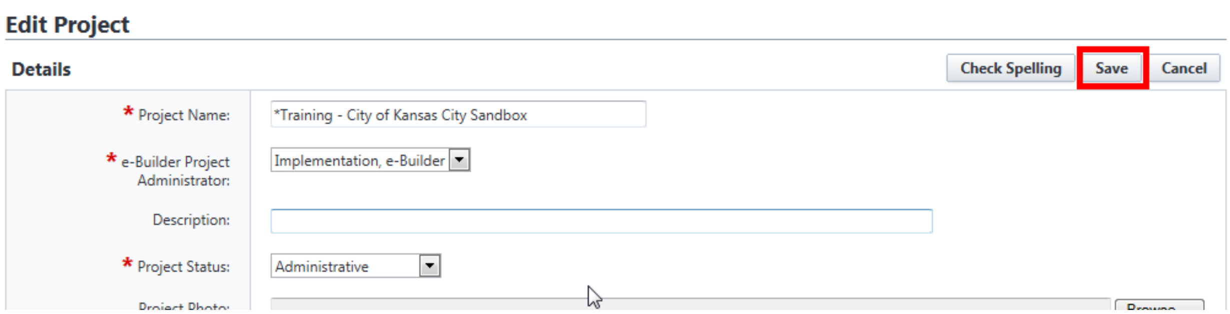


Editing Custom Fields

1. *Once in the project, click on **Edit** on the upper right-hand side of your screen.*



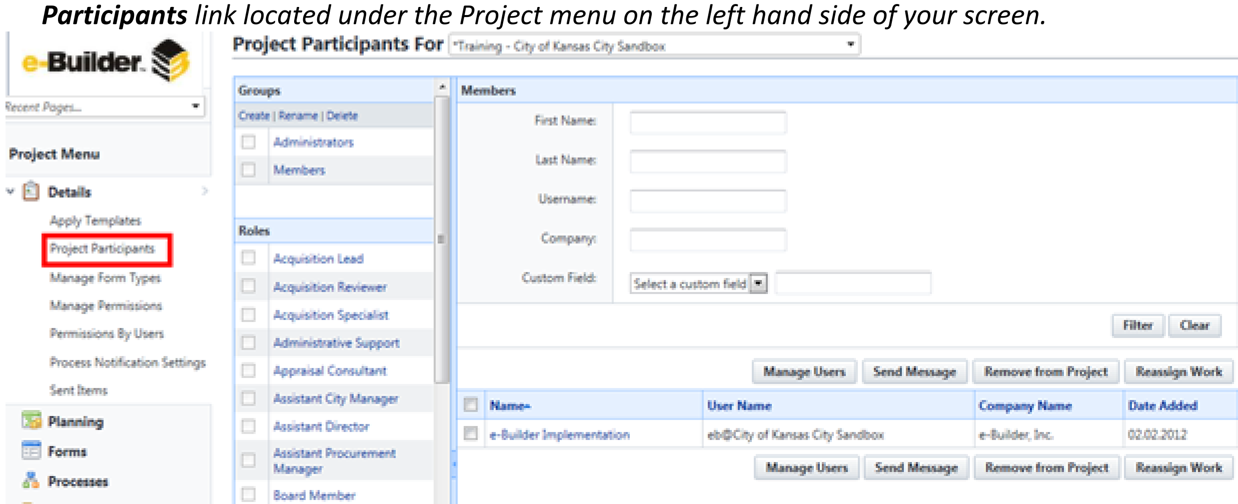
2. *Make the necessary changes and click **Save.***



Project Participants

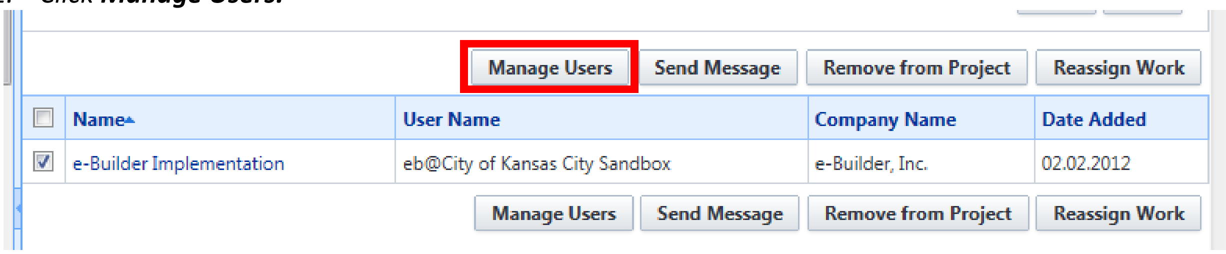
From the Project Participants link you will have the ability to send messages to users, reassign work and adding or removing users from your project.

1. *To access Project Participants navigate to the project you are working on. Click on the **Project Participants** link located under the Project menu on the left hand side of your screen.*

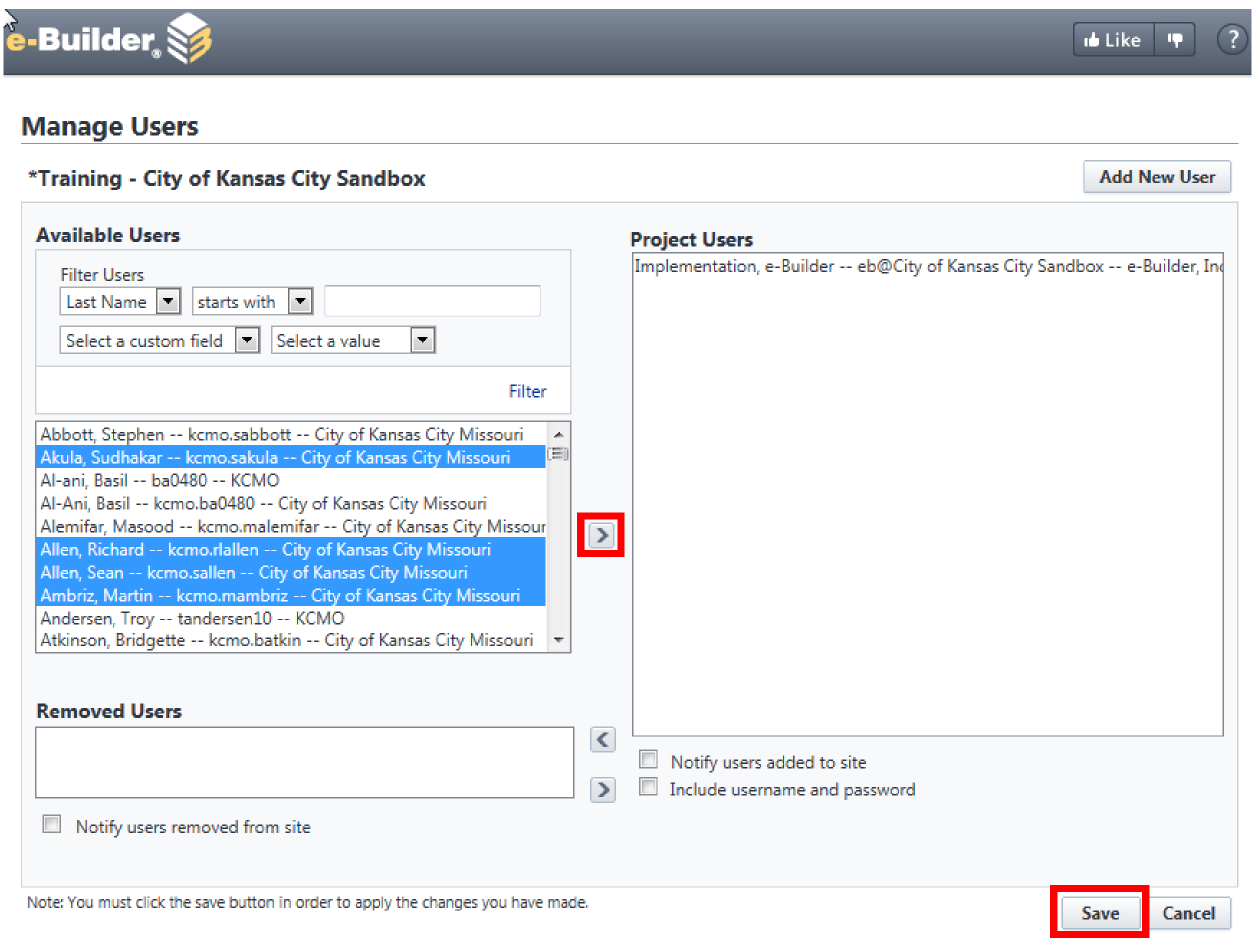


Manage Users

1. *Click **Manage Users.***



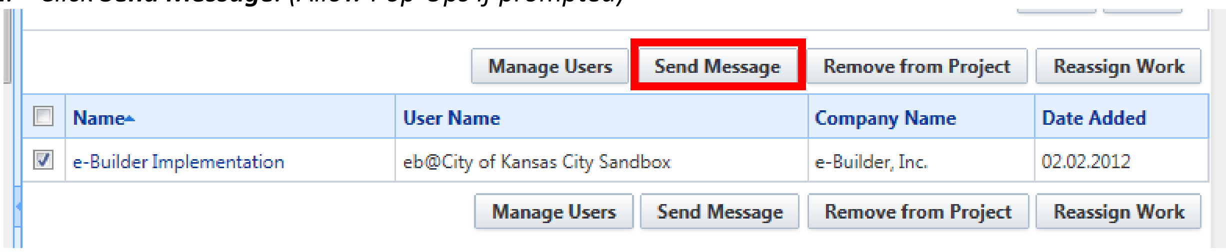
2. *Select the users you want to add to the project by highlighting the names on the left hand side of your screen. Use the arrow key to move them over to the right hand side of the screen. (To add multiple users at one time, hold down the control key while selecting users)*



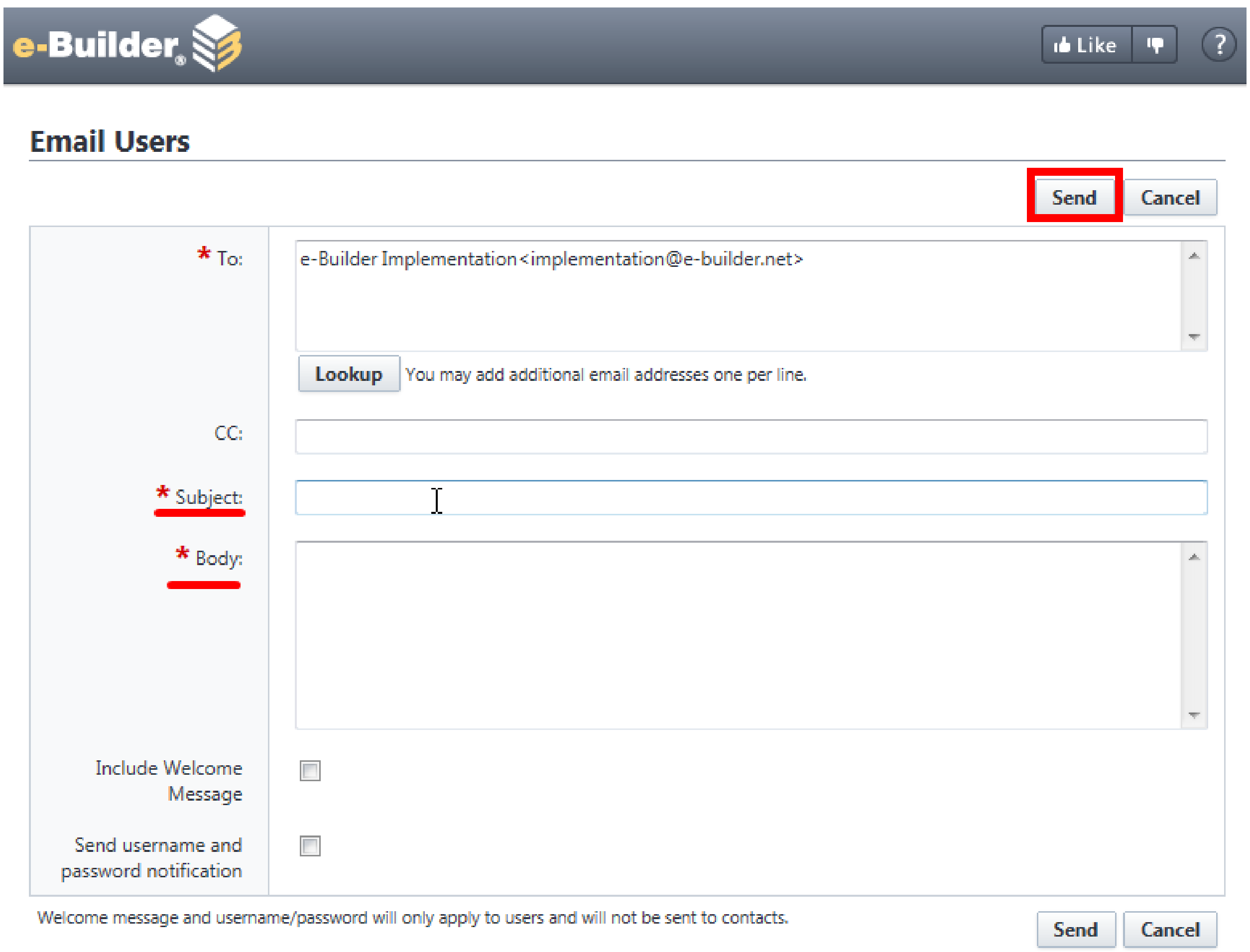
3. *If you would like to notify the users that they have been added to the project click the Notify users added to site. If you would like to provide the user with their user name and password, check the "Include username and password box".*
4. *Click **Save**.*

Sending a Message

1. *Choose the users you would like to send a message to by checking the box to the left of the user name. If you would like to send a message to all, click on the first box under the user field.*
2. *Click **Send Message**. (Allow Pop-Ups if prompted)*



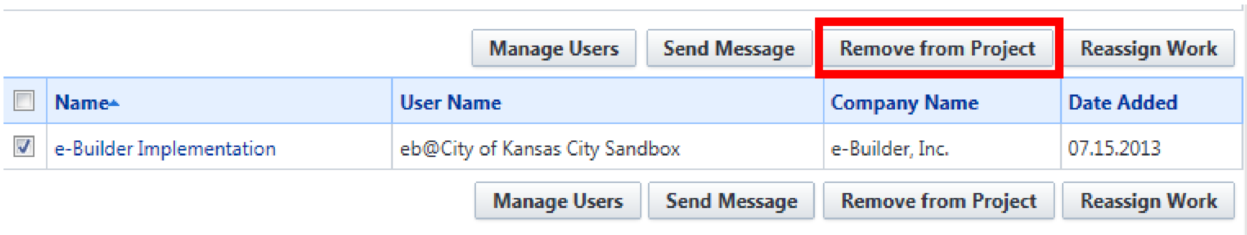
3. *Fill in the Subject and Body fields.*



4. *Click **Send**.*
5. *If you would like to send the user a welcome message, place check marks in the boxes next to "Include Welcome Message" and/or "Send Username and Password Notification".*

Removing Users from a Project

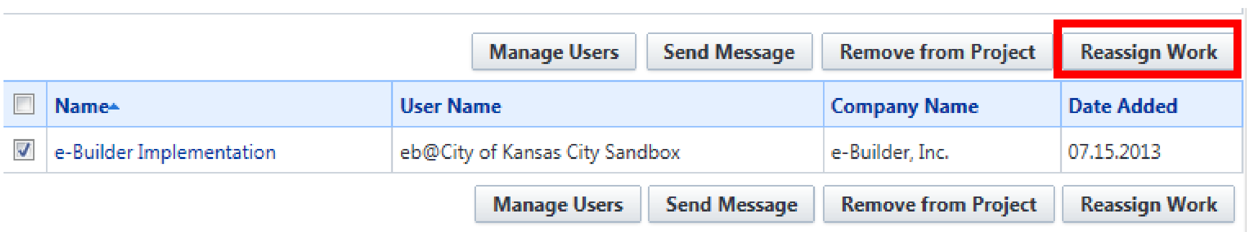
1. *Place a check mark in the box next to the users name you wish to remove from the project.*



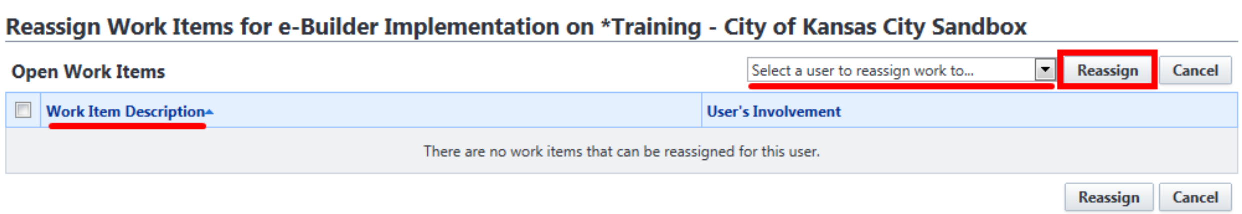
2. *Click **Remove from Project.***

Reassigning Work

1. *Select user to reassign work from by placing a checkbox to the left of that user's name and clicking **Reassign Work**.*



2. *Check work items to be reassigned. Select user from drop-down list that work will be assigned to.*



3. *Click **Reassign**. (Example does not show any open work items to be reassigned since there are none)*

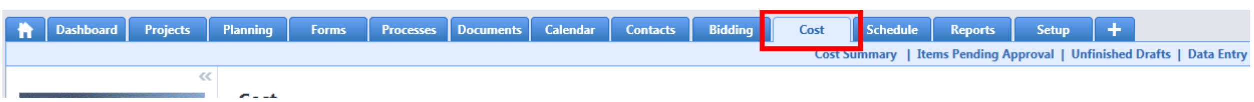
Cost Module

The e-Builder cost module helps manage the cost management processes that owners, general contractors, and other industry participants go through in construction. It standardizes the tracking of costs across an entire program. The cost module also eases the burden of reporting on Budgets, Change Orders, Actual Costs, and more through the reports in the reports module. These reports can be generated or modified to track any of the data entered in the cost module.

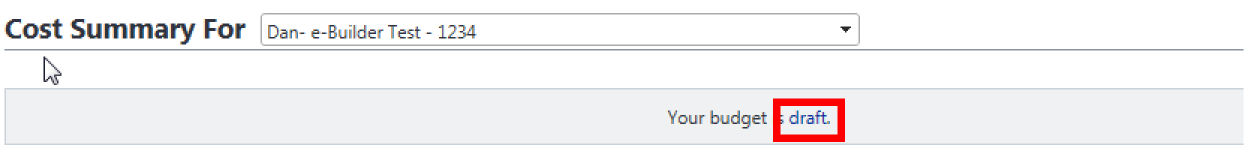
Creating a Budget

A budget is the original detailed cost estimate for your project.

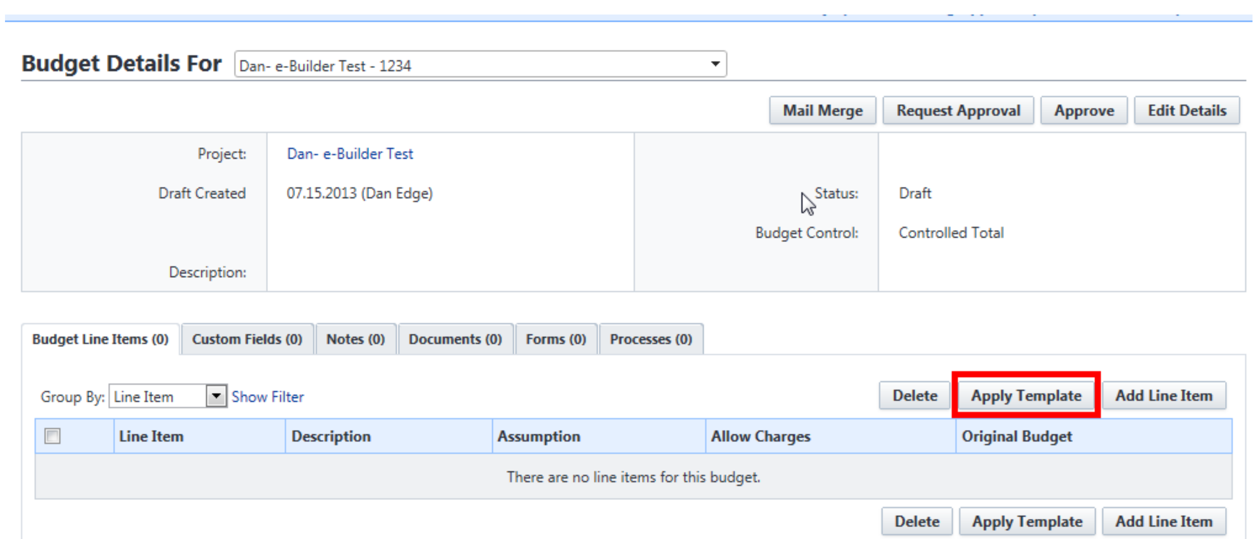
1. *Go to the **Cost** tab.*



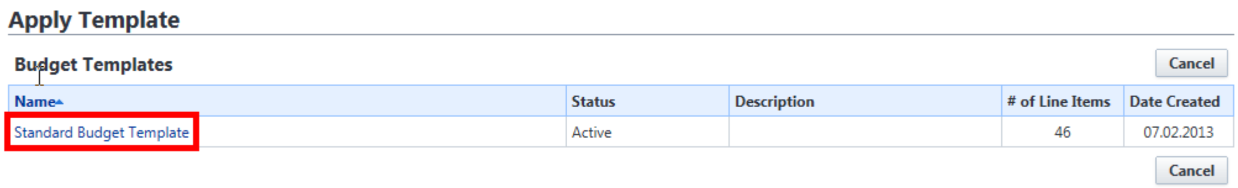
2. *Select the project you need to create the budget for.*
3. *Clink on the **draft** link.*



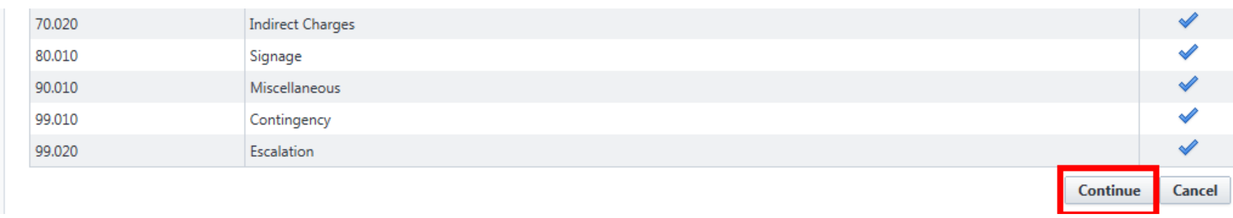
4. *If the template was not applied when the project was created click the Apply Template button.*



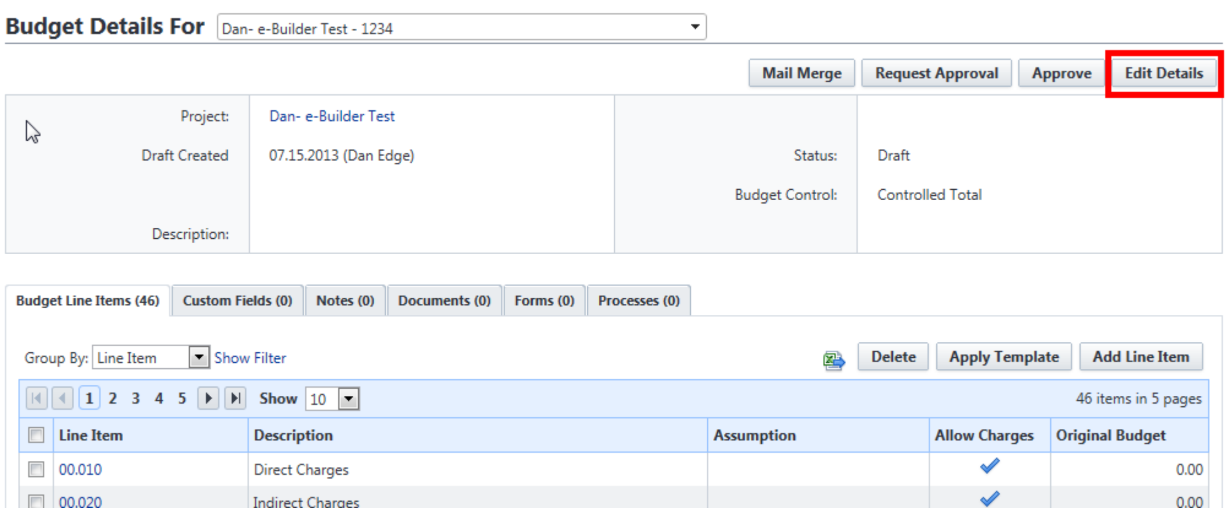
5. *Select appropriate budget template.*

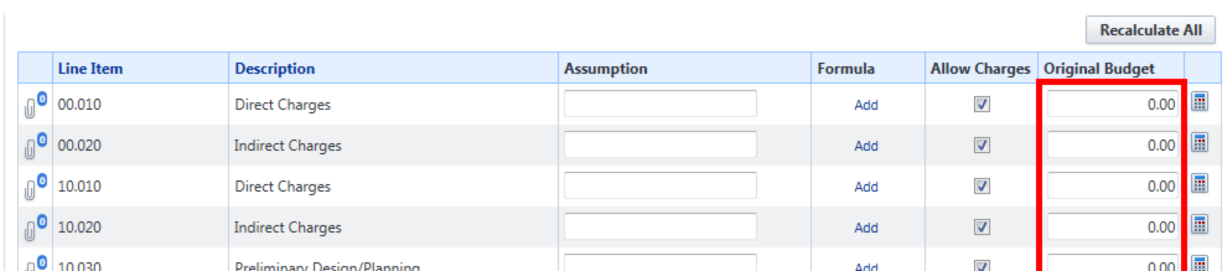


6. *Press **Continue** to confirm.*



7. *Click **Edit Details** and enter the dollar amount of the budget for each line item.*



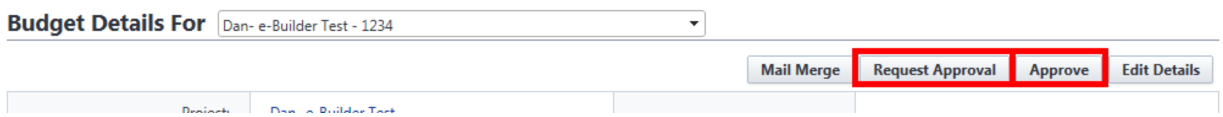


**Note: Check the "Allow Charges" checkbox to allow for commitments to be charged against that line item.*

**Note: Click "Add" button to add formula to line item (used when line items are based on expression of other items, ex. percentages)*

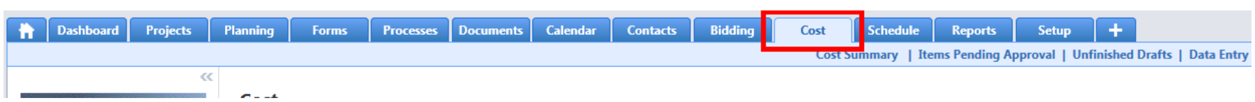
8. *Click the **Save** button.*

9. *Depending on your permissions, either click the* ***Request Approval*** *or* ***Approve*** *button.*

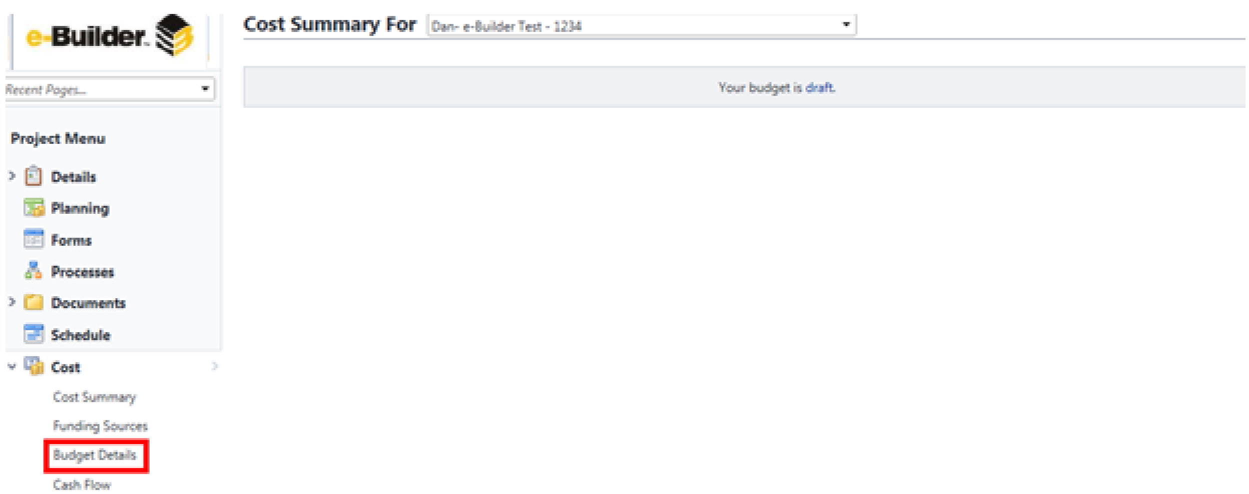


Budget Changes

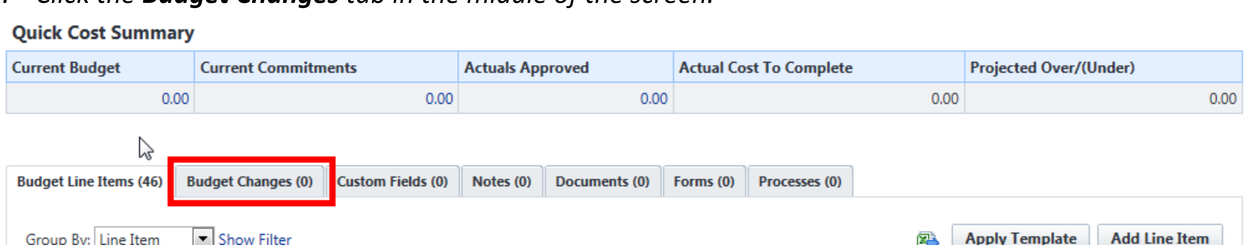
1. *Go to the* ***Cost*** *tab.*



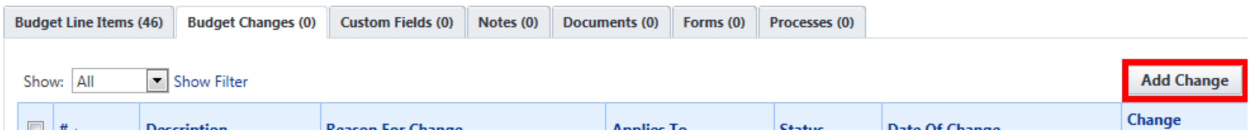
2. *Select the project you wish to change the budget for.*
3. *Click on the* ***Budget Details*** *link on the lower left hand side of the screen.*



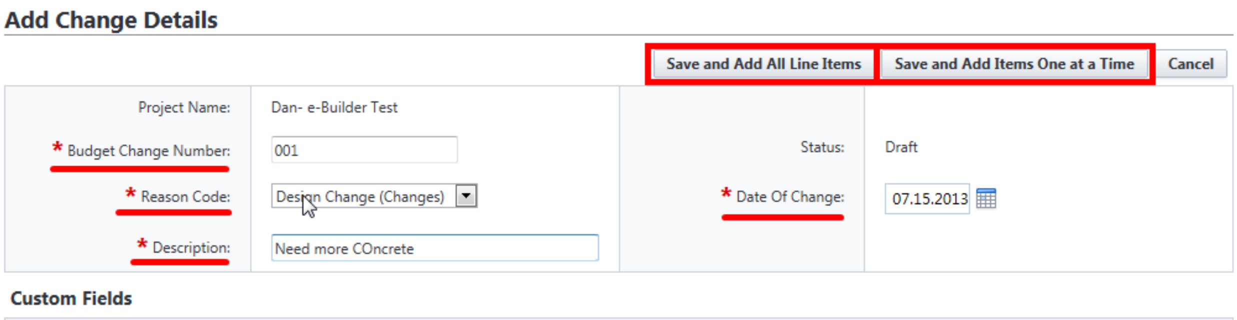
4. *Click the* ***Budget Changes*** *tab in the middle of the screen.*



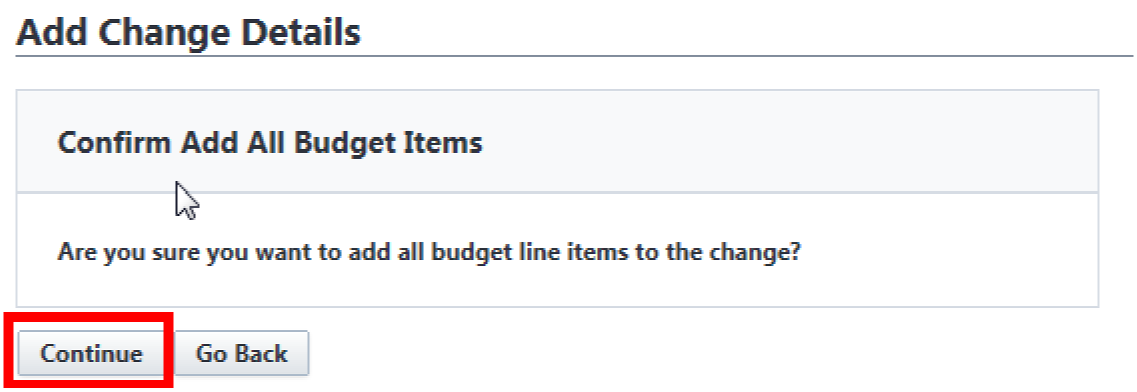
5. *Click on the* ***Add Change*** *button.*



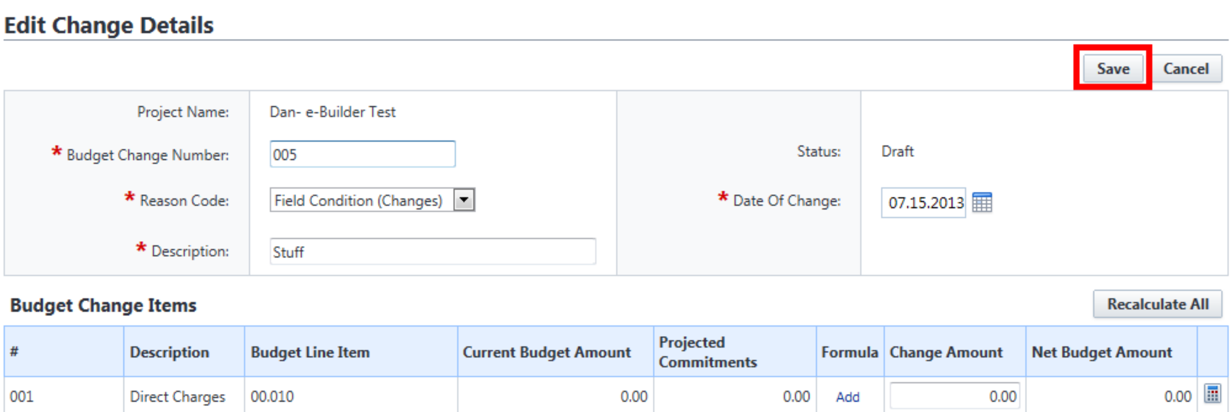
6. *Fill out the budget change information.*



7. *Click on the **Save & Add Al Line Items** button if the change affects more than one line item in the commitment or click on the **Save and Add Items One at a Time** button if only item in the commitment needs to be changed.*
8. *Confirm change by clicking **Continue**.*

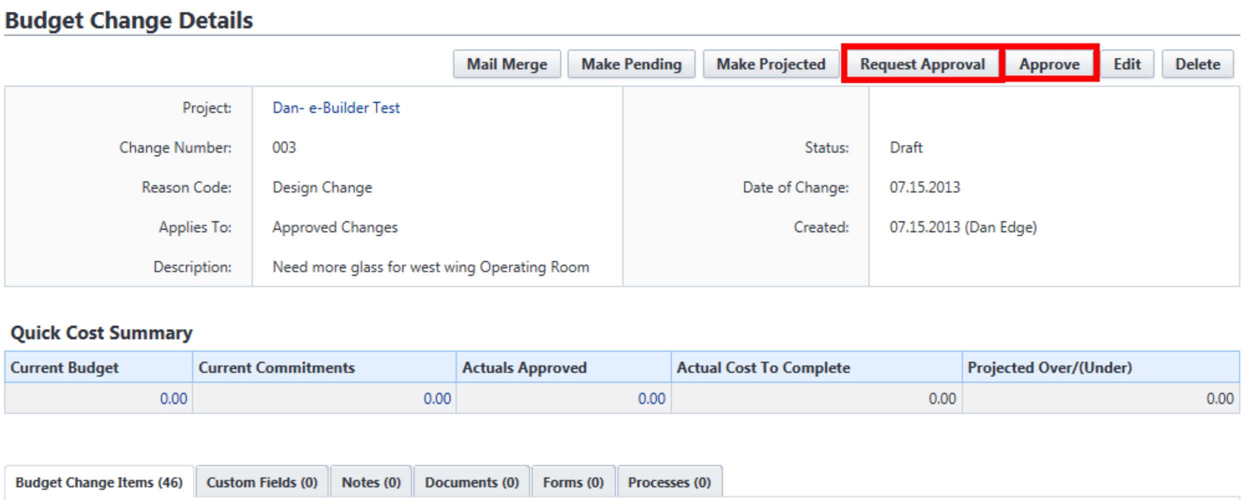


9. *Press **Save** button if satisfied with changes.*



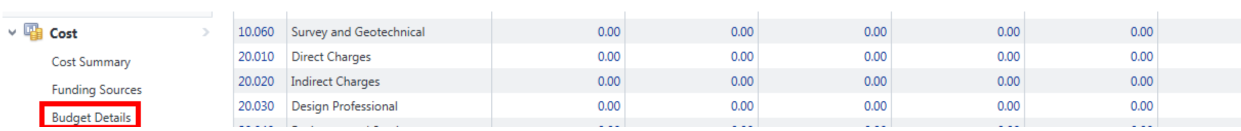
*** See instructions below to add a Note, document, form, or process to a budget change.*

*10. Depending on your permissions either click the **Request Approval** or **Approve** button.*

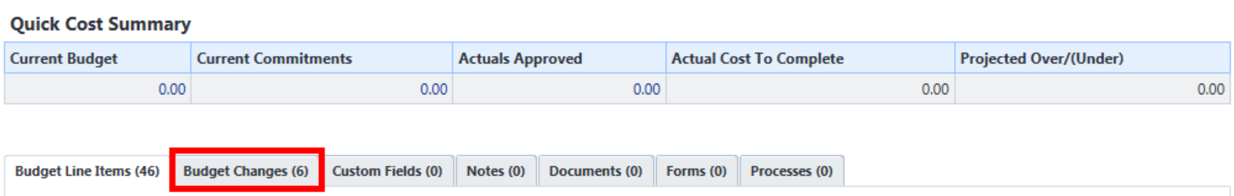


Adding a Note, Document, Form, or Process to a Budget Change

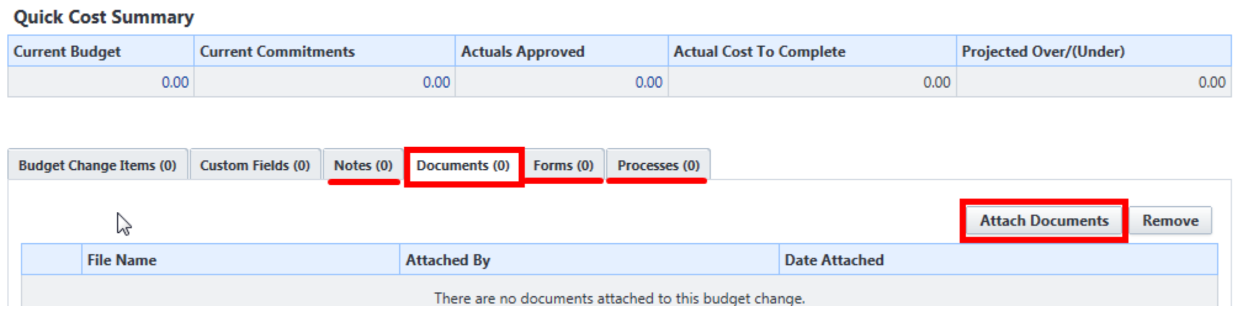
1. *Navigate to specific budget item by selecting **Budget Details** from the left hand menu.*



2. *Select **Budget Changes**.*



3. *Select specific Budget Change.*
4. *Use the tabs to select type of attachment and **Attach** button to attach appropriate item.*

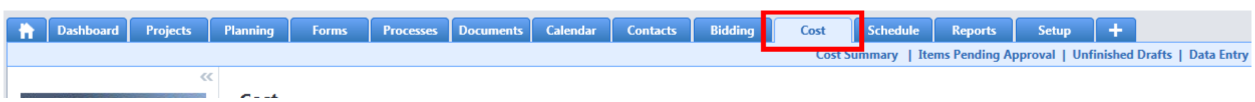


Commitments

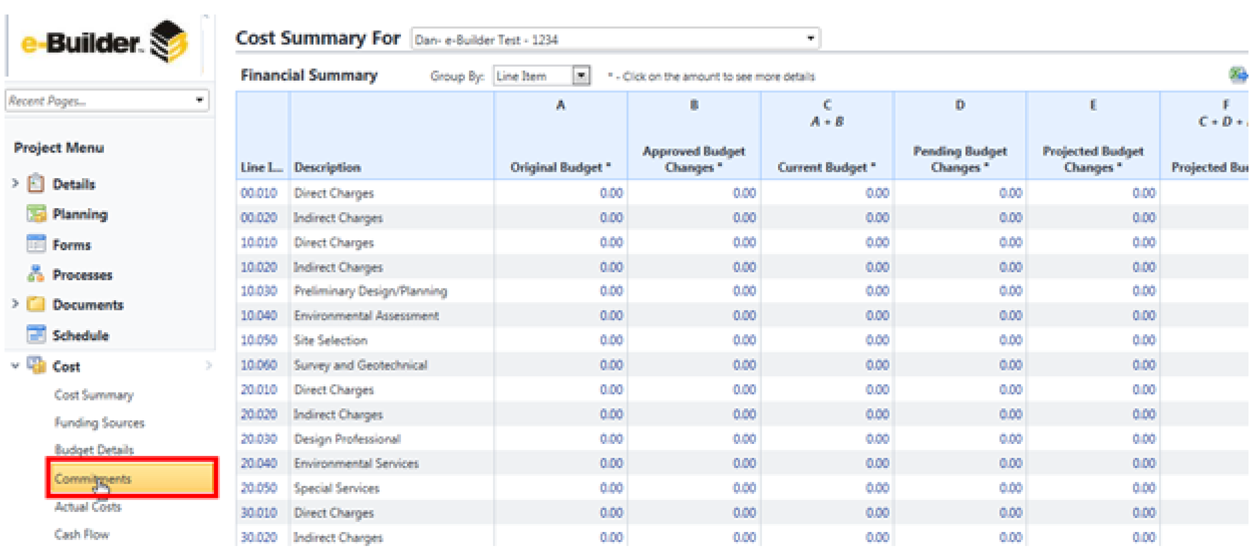
A commitment is a promise that you make to a seller to purchase goods or services in exchange for money in accordance with specific terms and conditions. The most common types of commitments are contracts and purchase orders.

Entering Commitments

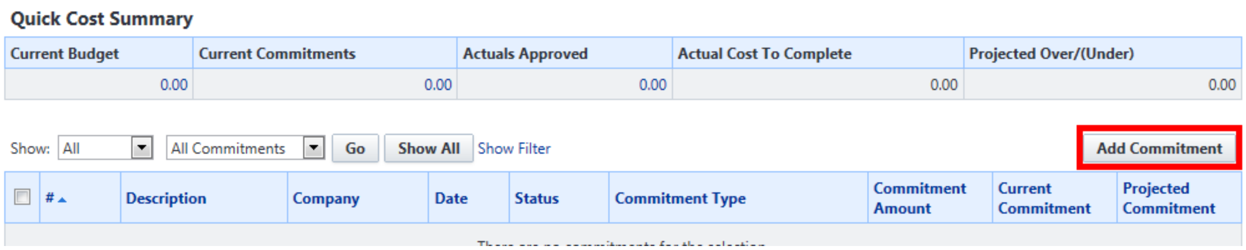
1. *Go to the **Cost** tab.*



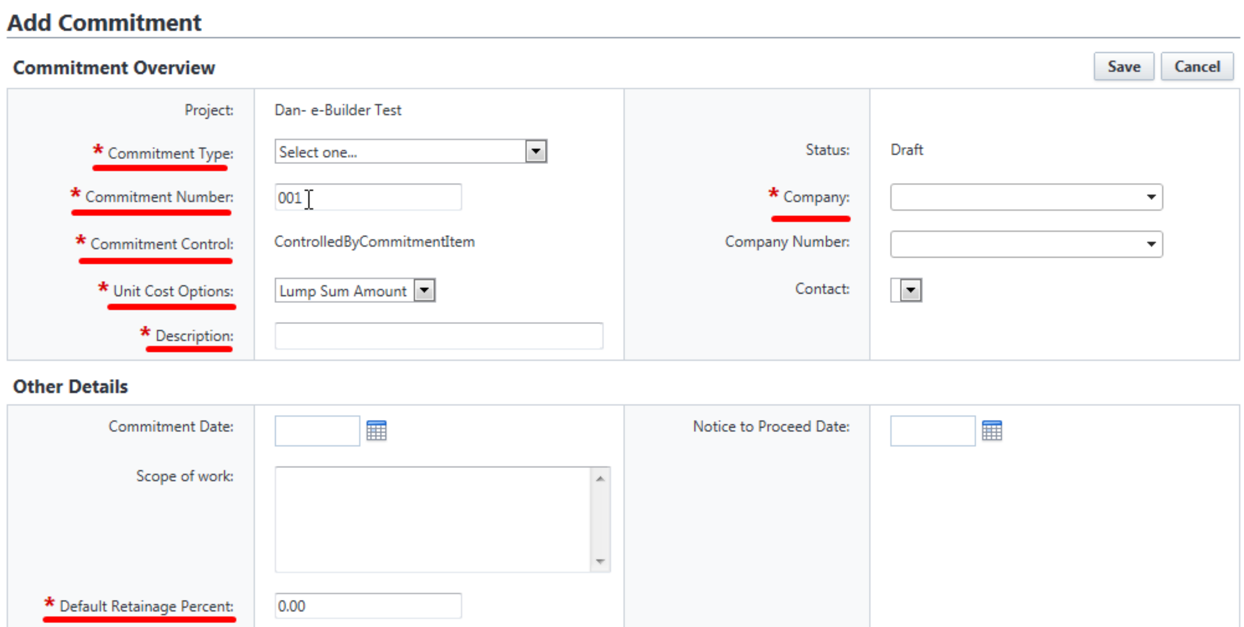
2. *Select the project you need to enter the commitment for.*
3. *Click on the **Commitments** link on the lower left hand side of the screen.*



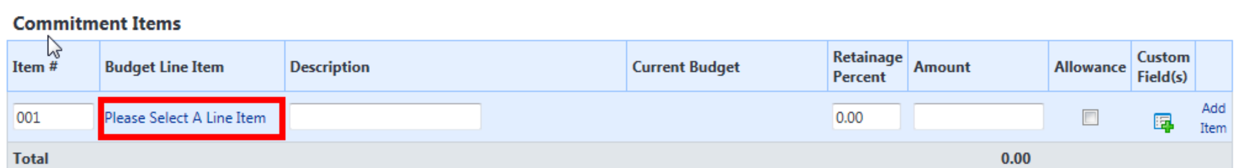
4. *Click the **Add Commitment** button.*



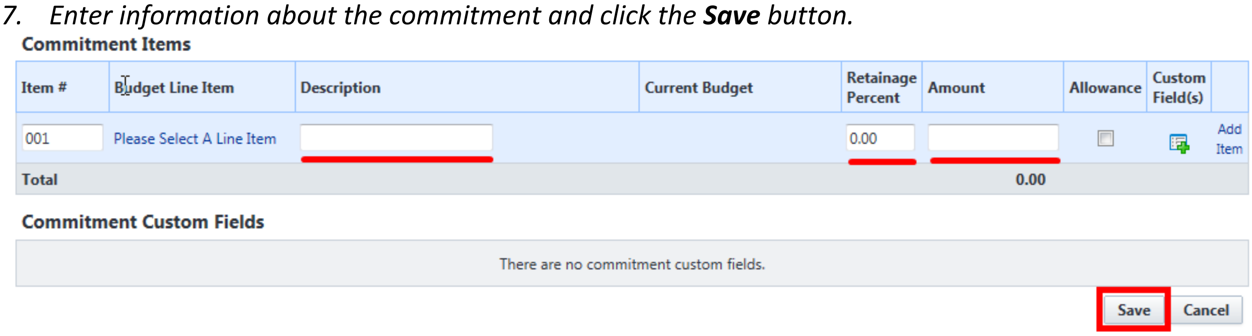
5. *Enter required commitment information.*



6. *Select a commitment line item by clicking* ***Please Select A Line Item*** *and choosing appropriate budget item.*

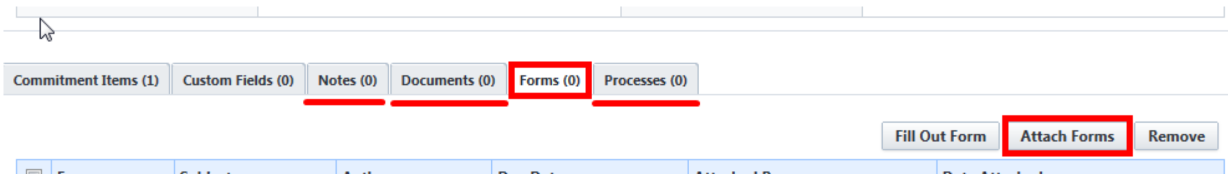


7. *Enter information about the commitment and click the* ***Save*** *button.*

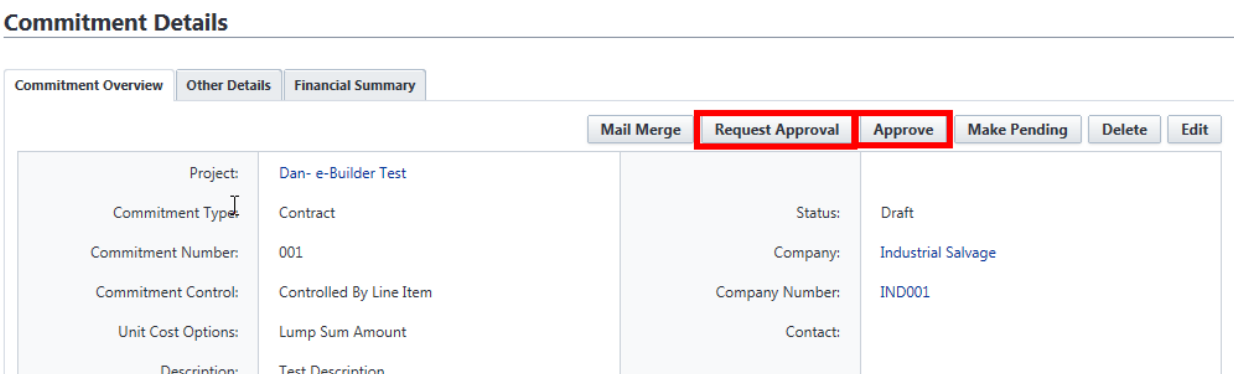


8. *Click on the* ***Save & Add New*** *button if the commitment has more than one item or click on the* ***Save*** *button if this is the only item in the commitment (or if this is the last item).*

9. *Click on the center tabs and attach documents, forms, notes, or processes if needed by clicking* ***Attach*** *button*

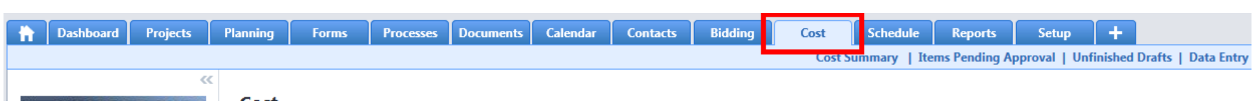


10. *Depending on your permissions click either* ***Request Approval,*** *or* ***Approve****.*

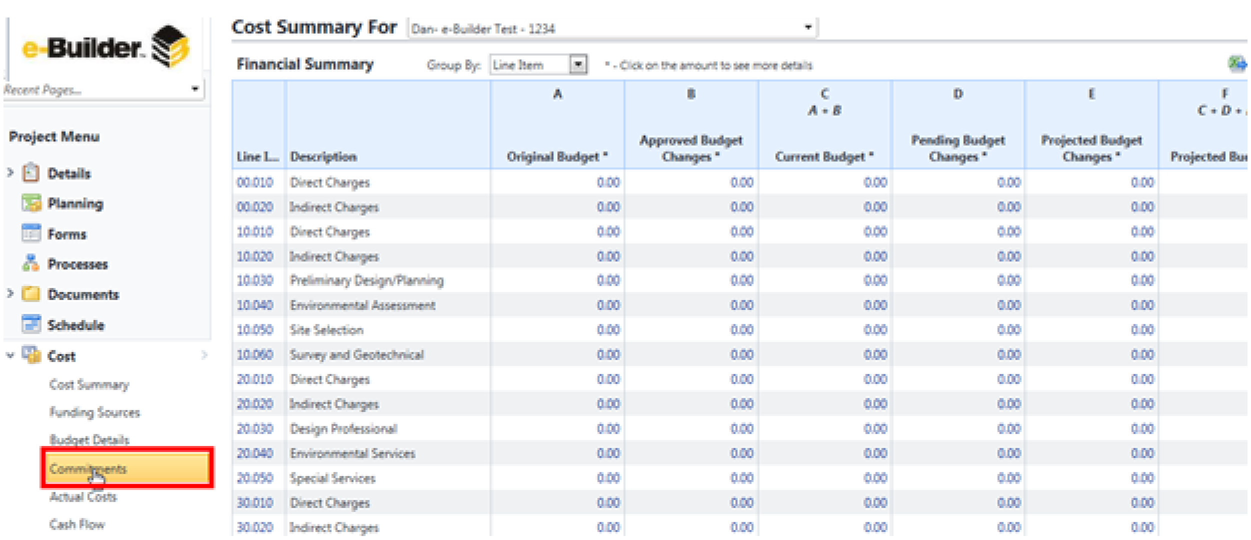


Commitment Changes

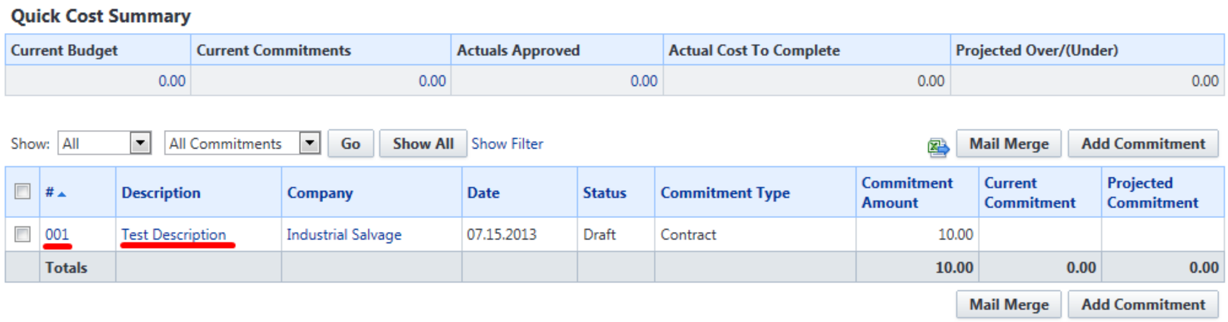
1. *Go to the* ***Cost*** *tab.*



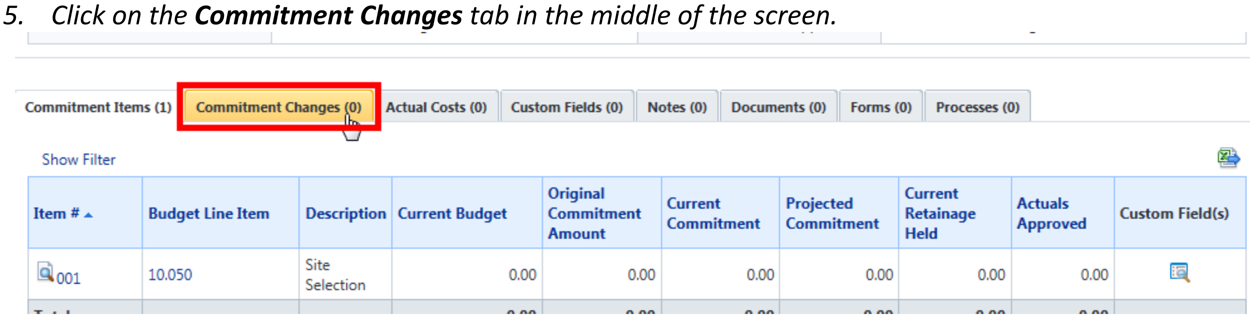
2. *Select the project you need to enter a commitment change for.*
3. *Click on the* ***Commitments*** *link on the lower left hand side of the screen.*



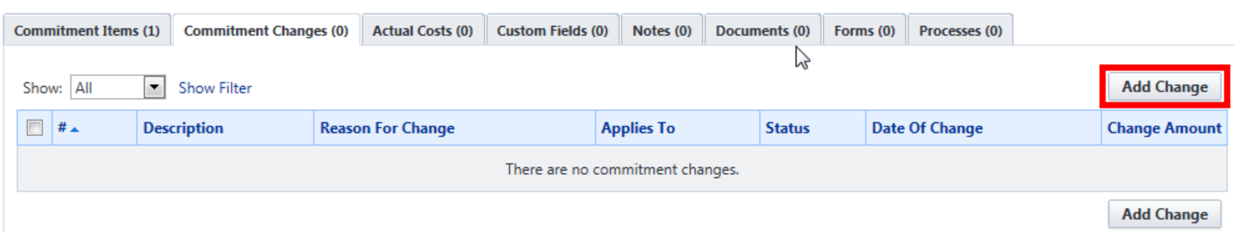
4. Click on the commitment number or description of the appropriate item.



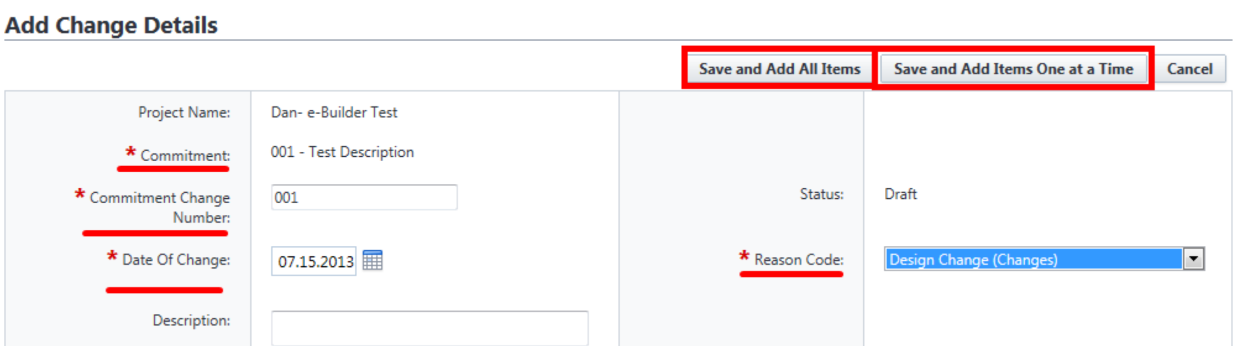
*5. Click on the **Commitment Changes** tab in the middle of the screen.*



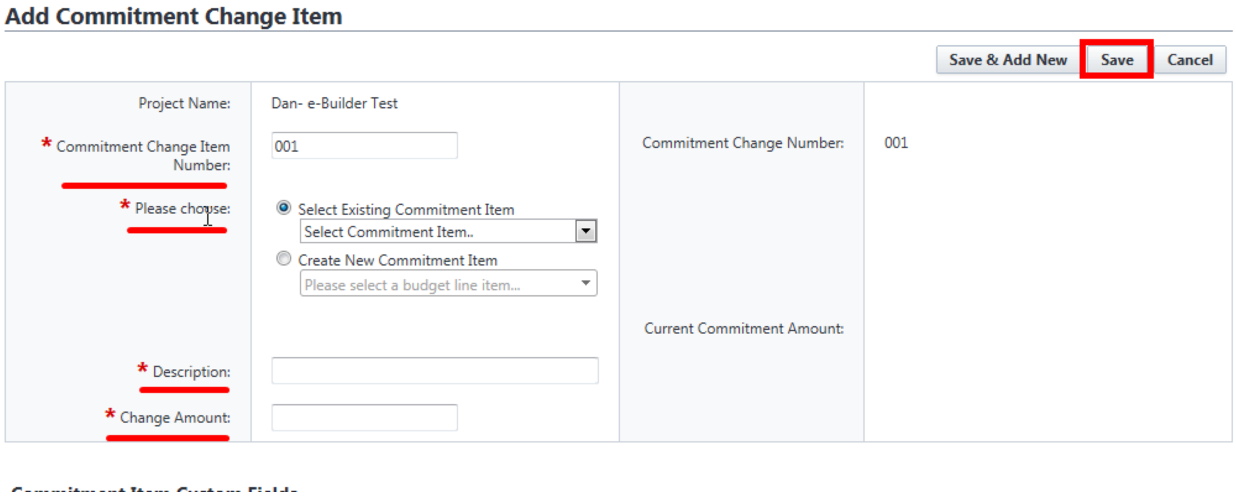
*6. Click on the Add **Change** button.*



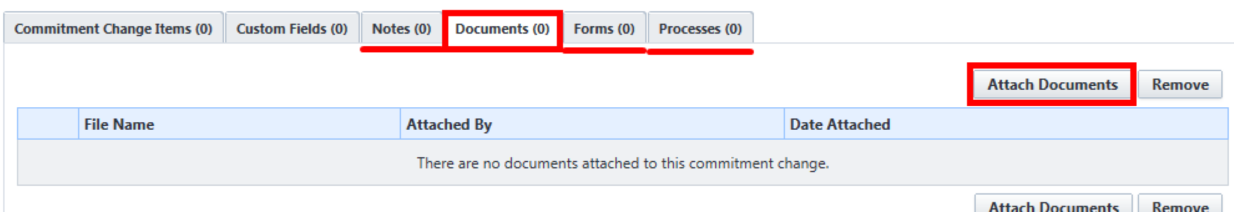
*7. Fill out the commitment change information and select **Save and Add All Items** or **Save and Add Items One at a Time.***



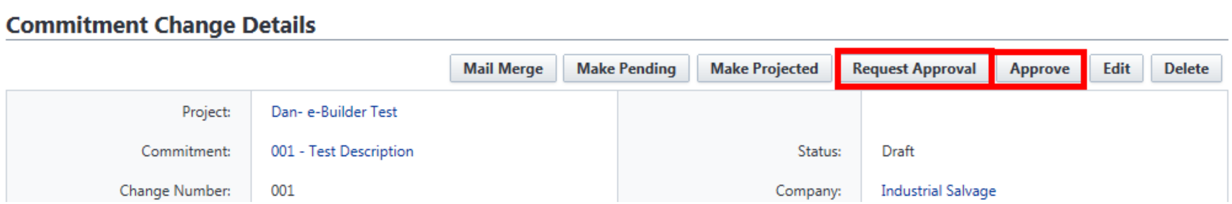
*8. Add Commitment Change Item by filling in required information and clicking **Save**. (Note: click **Save & Add New** to add multiple items on this screen vs. restarting the process.)*



9. *Click on the center tabs and **Attach** button to attach notes, documents, forms, or processes if needed.*



10. *Depending on your permissions click either **Request Approval**, or **Approve**.*

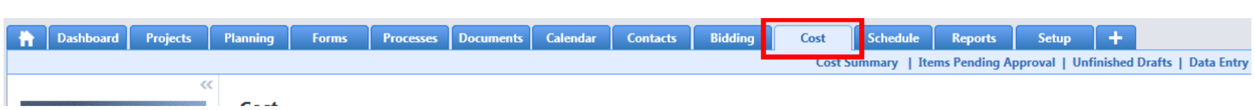


Actual Costs/Invoices

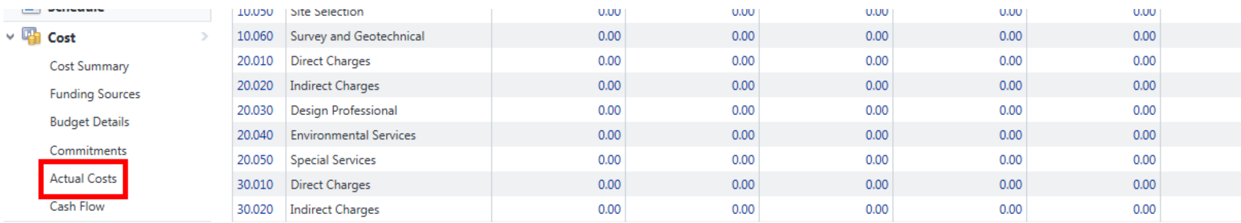
Actual Costs/Invoices are monies that are owed to vendors or general contractors for work performed on the project.

Creating an Invoice

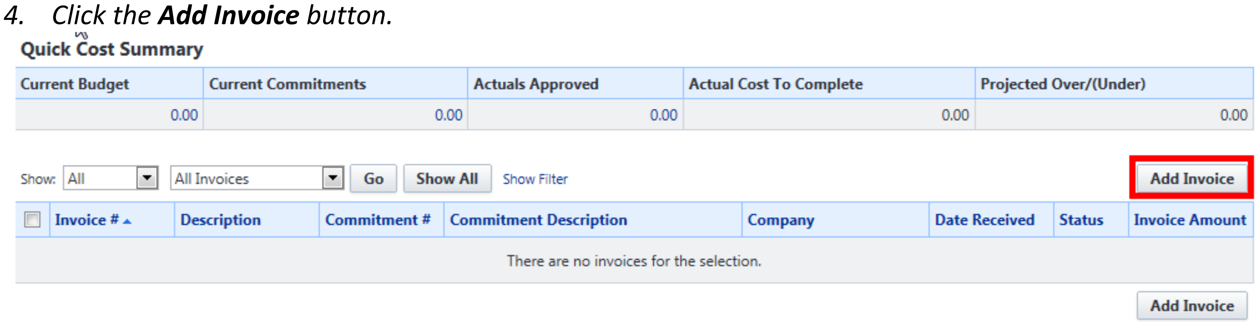
1. *Go to the **Cost** tab.*



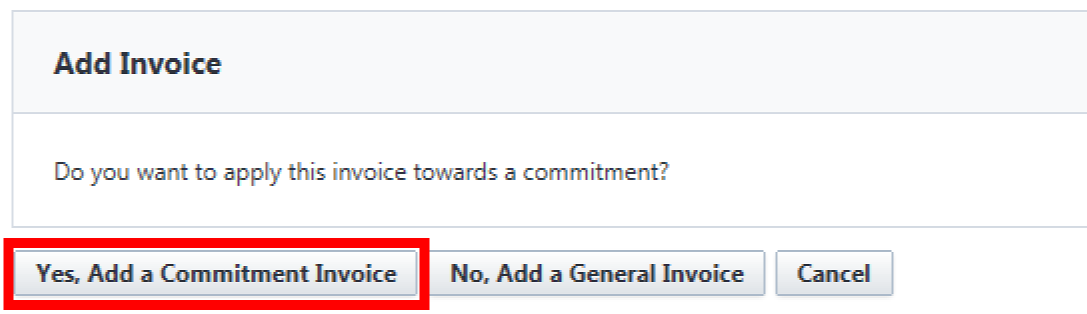
2. *Select the project you need to enter the invoice for.*
3. *Click on the **Actual Costs** link on the lower left hand side of the screen.*



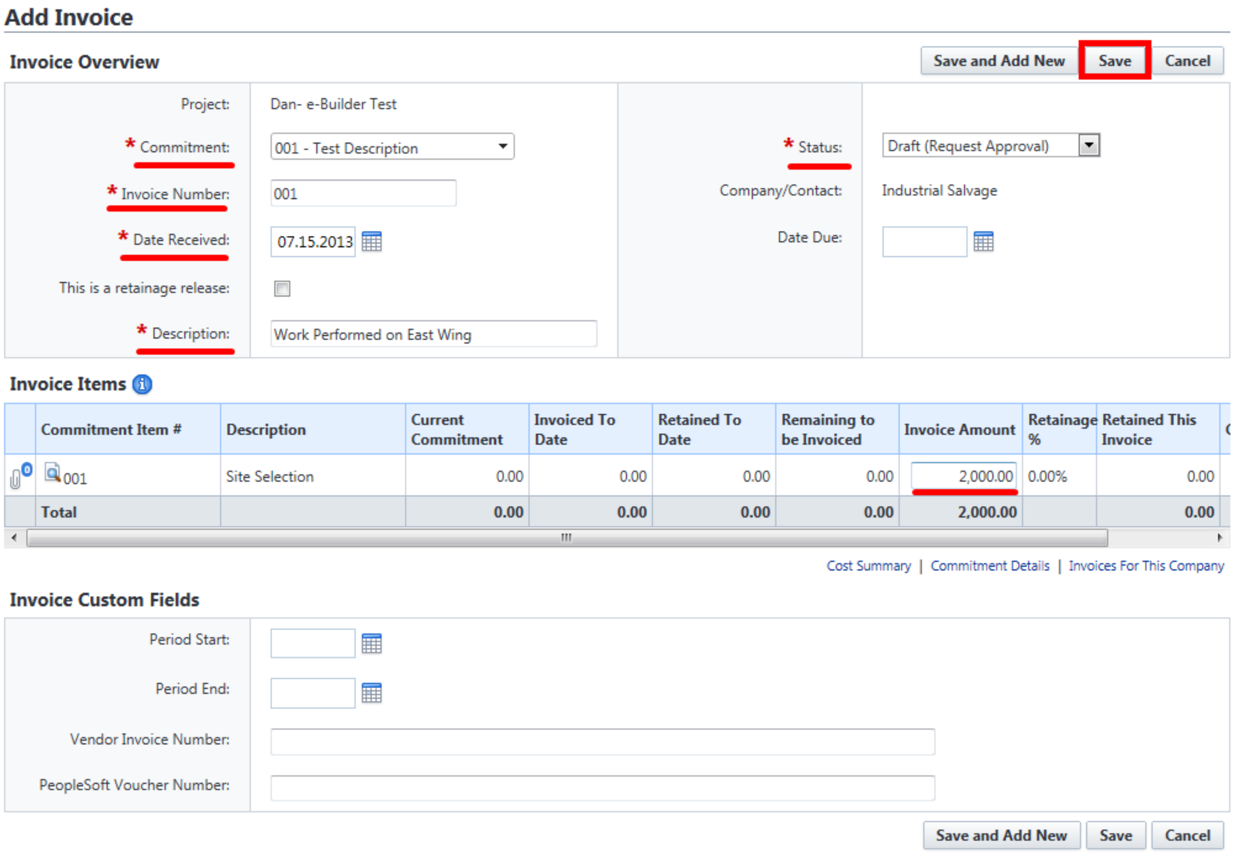
4. *Click the **Add Invoice** button.*



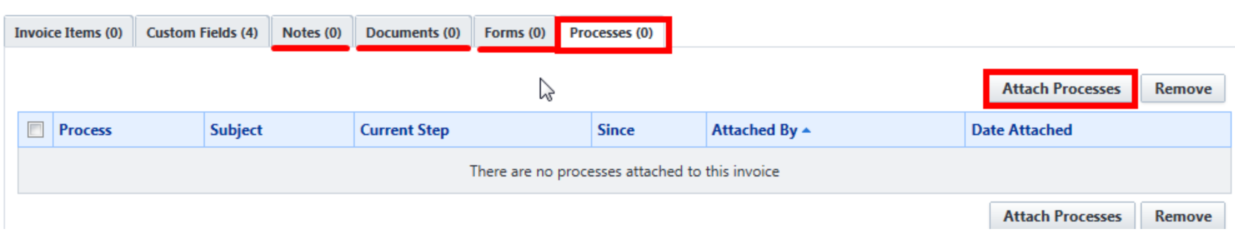
5. *Click the **Yes, Add a Commitment Invoice** button.*



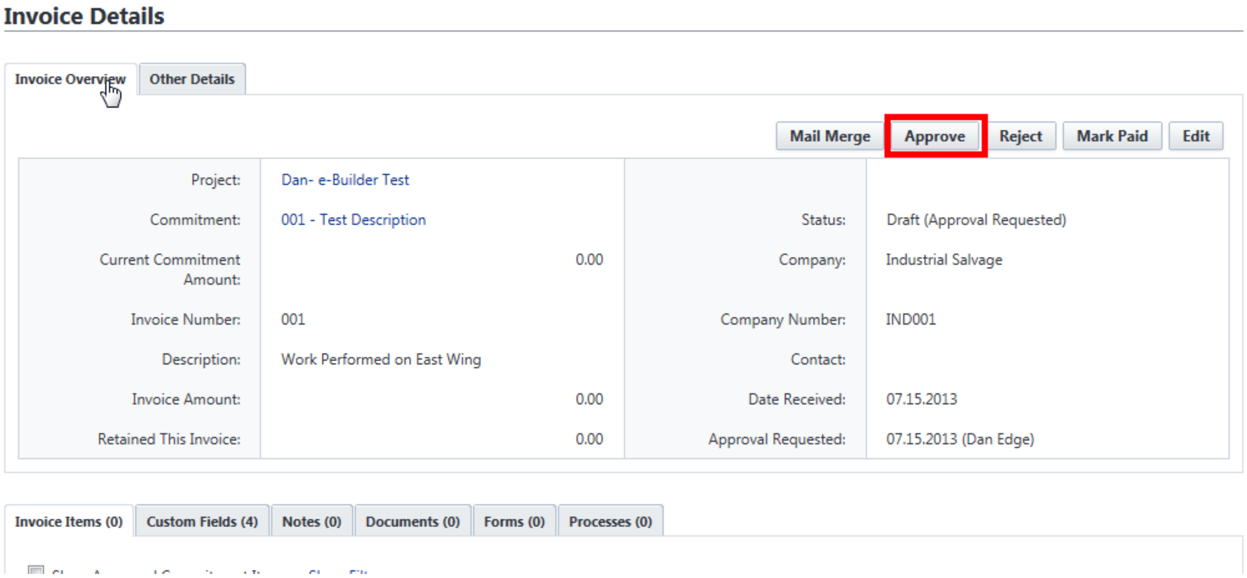
6. *Select the commitment from the commitment drop down list and enter the dollar amount for each commitment item.*



7. *Click the **Save & Add New** or click the **Save** button if this is the only item in the commitment (or if this is the last item).*
8. *Click on the center tabs and **Attach** button to attach documents, notes, forms, or processes if needed.*



9. *Depending on your permissions click either **Request Approval**, or **Approve**.*

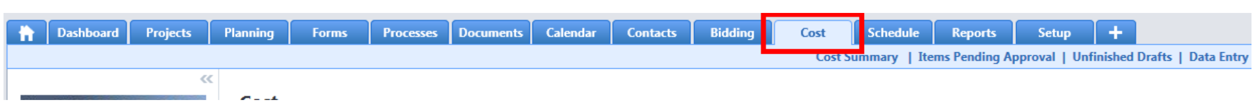


Forecasting

Forecasting in e-Builder is the process by which a project's final cost is estimated. E-Builder provides the ability to forecast based on progress and any changes since the budget was formed. When added to commitments, forecasting will provide an accurate projection of final project costs. Depending on your forecasting practices, two methods can be used in e-Builder: Detail Mode or Adjustment Mode. It is recommended to use Detail Mode since it tends to give more accurate results.

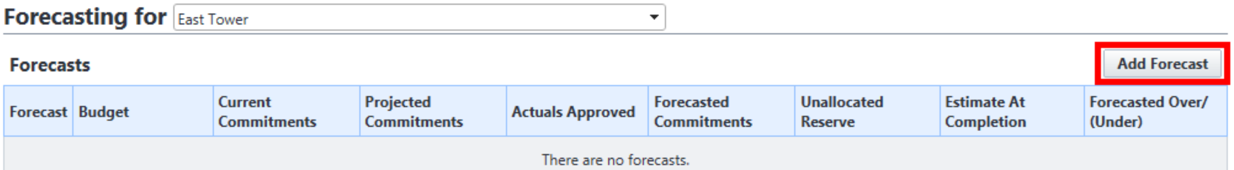
Detail Mode (forecasting of individual commitments)

1. *Click on the **Cost** tab at the top of the screen.*

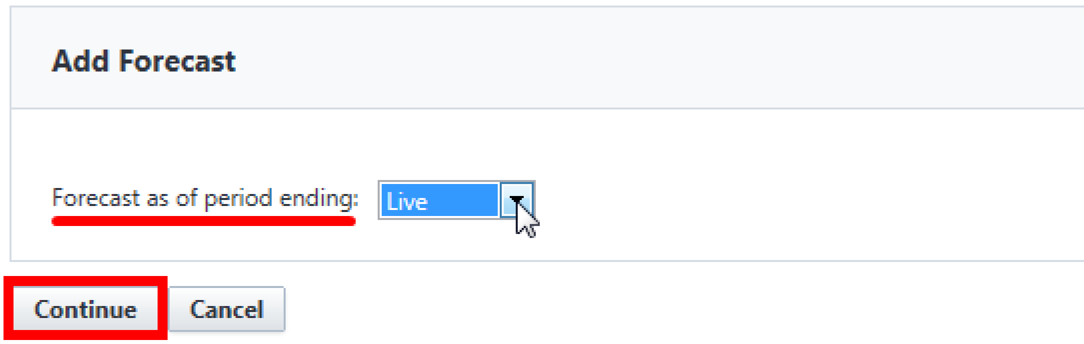


2. *Select the project for which you would like to create a forecast.*
3. *Click the **Forecasts** link under the Cost Menu on the left side of the screen.*

4. *Click on the **Add Forecast** button.*

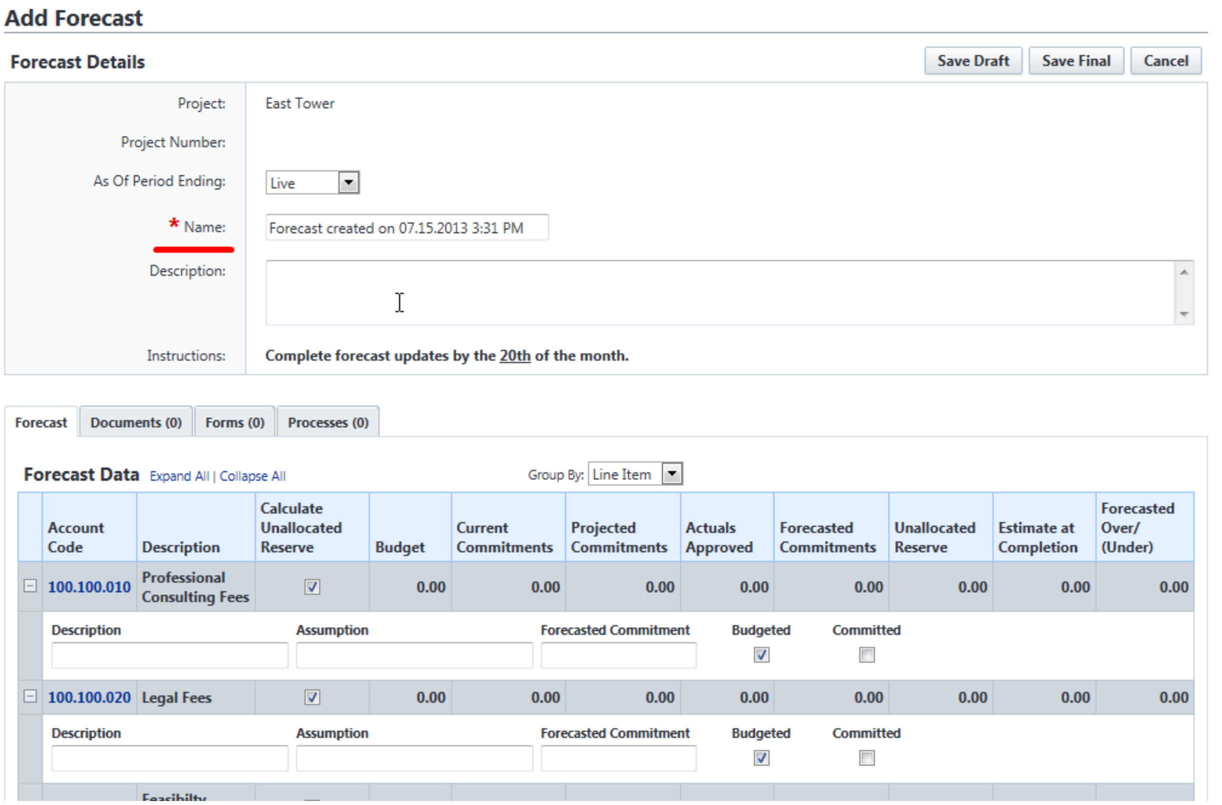


5. *Select a period to allow forecasting to place after and click* ***Continue****.*

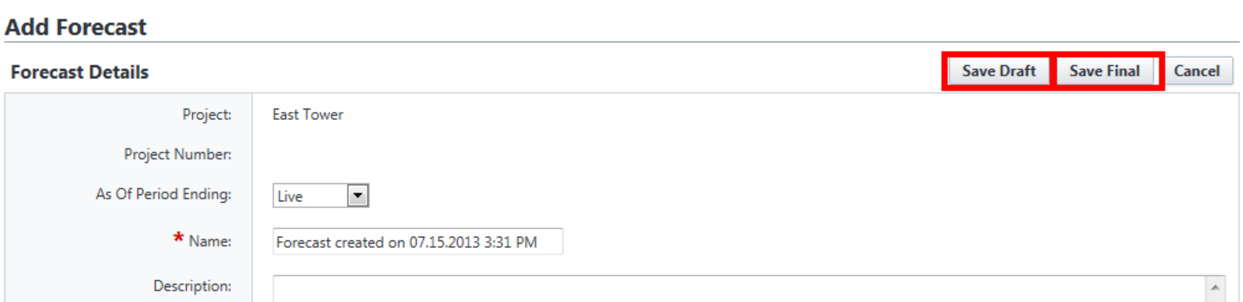


6. *A required name is auto-generated but can be changed if desired.*
7. *The 'Calculate Unallocated Reserve' check-box is checked by default. The 'Unallocated Reserve' is the difference between budget and projected commitments. A 'check' in this box yields an 'Estimate at Completion' that is equal to your budget, assuming that your project will finish on budget.*
8. *De-select the 'Calculate Unallocated Reserve' check-box when you are ready to begin forecasting commitments.*
9. *Enter a description, assumption, and amount for a forecasted commitment and click the* ***Add*** *link.*

   NOTE: The 'Budgeted' check box indicates that the amount of your forecasted commitment has been accounted for in the budget. De-select this box if that is not the case.



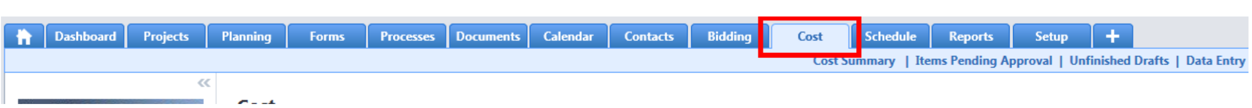
10. *When you have completed your forecast, click the **Save Draft** or **Save Final** button.*



11. *When your forecasted commitment is reflected in e-Builder via a Commitment or Change Order process, access the forecast for the appropriate budget line item and click the 'Committed' check box.*

Adjustment Mode (forecasting by increasing/decreasing the estimate at completion)

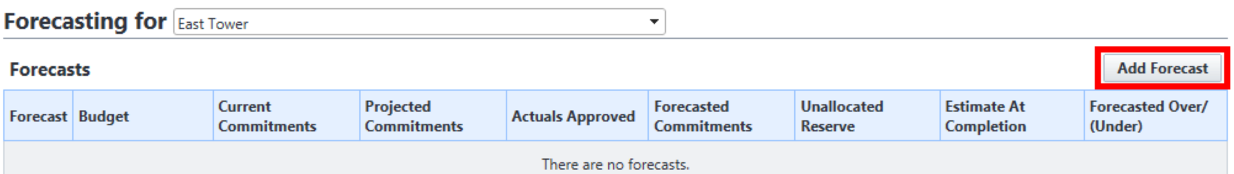
1. *Click on the **Cost** tab at the top of the screen.*



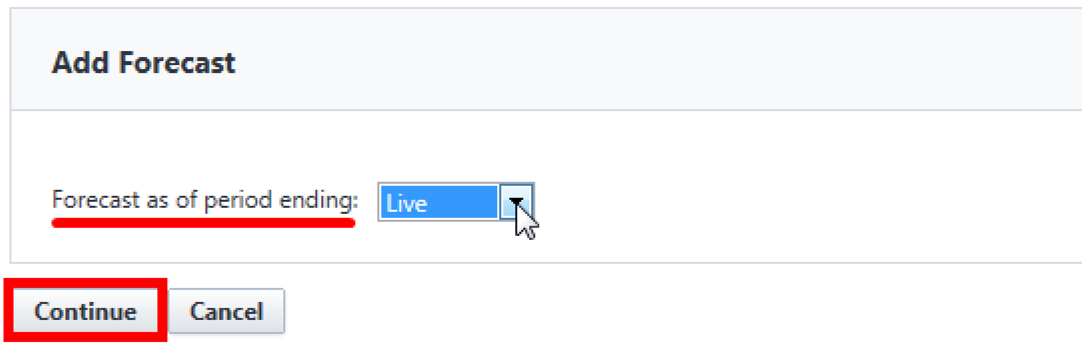
2. *Select the project for which you would like to create a forecast.*
3. *Click the **Forecasts** link under the Cost Menu on the left side of the screen.*

003.003.010	Program Management	38,000.00	114,600.00	(57,100.00)	15,836.00	15,780.00
003.020	Surveys	206,000.00	986,391.00	(732,345.00)	71,006.50	70,907.50
003.003.020	Surveys	206,000.00	986,391.00	(732,345.00)	71,006.50	70,907.50
003.030	Testing	585,981.45	99,055.00	(11,573.55)	25,600.00	25,558.00
003.003.030	Testing	585,981.45	99,055.00	(11,573.55)	25,600.00	25,558.00
003.040	Permitting & Fees	245,000.00	104,000.00	144,000.00	0.00	0.00
003.003.040	Permitting & Fees	245,000.00	104,000.00	144,000.00	0.00	0.00
003.050	Insurance & Fees	314,000.00	900,000.00	(576,000.00)	0.00	0.00
003.003.050	Insurance & Fees	314,000.00	900,000.00	(576,000.00)	0.00	0.00
003.070	Design	4,160,000.00	1,563,964.00	(254,464.00)	509,500.00	384,500.00
003.003.070	Design	4,160,000.00	1,563,964.00	(254,464.00)	509,500.00	384,500.00

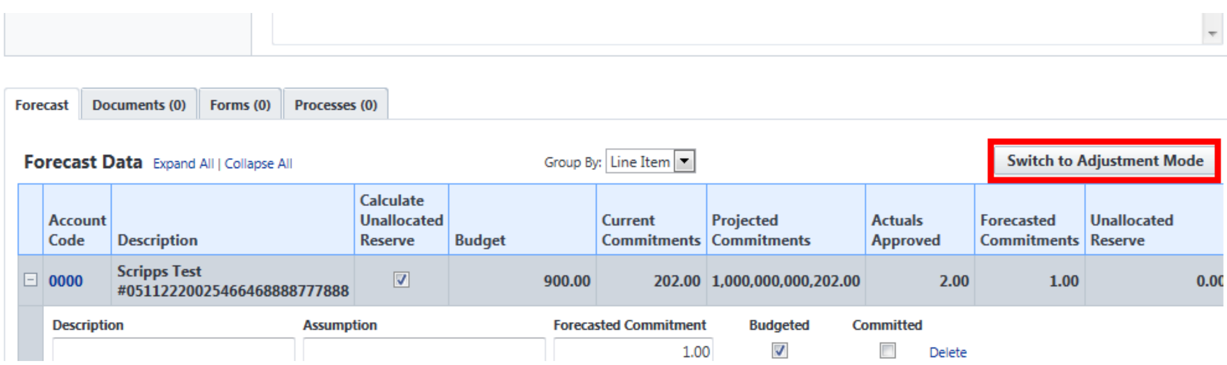
4. *Click on the **Add Forecast** button.*



5. *Select a period to allow forecasting to place after and click **Continue**.*



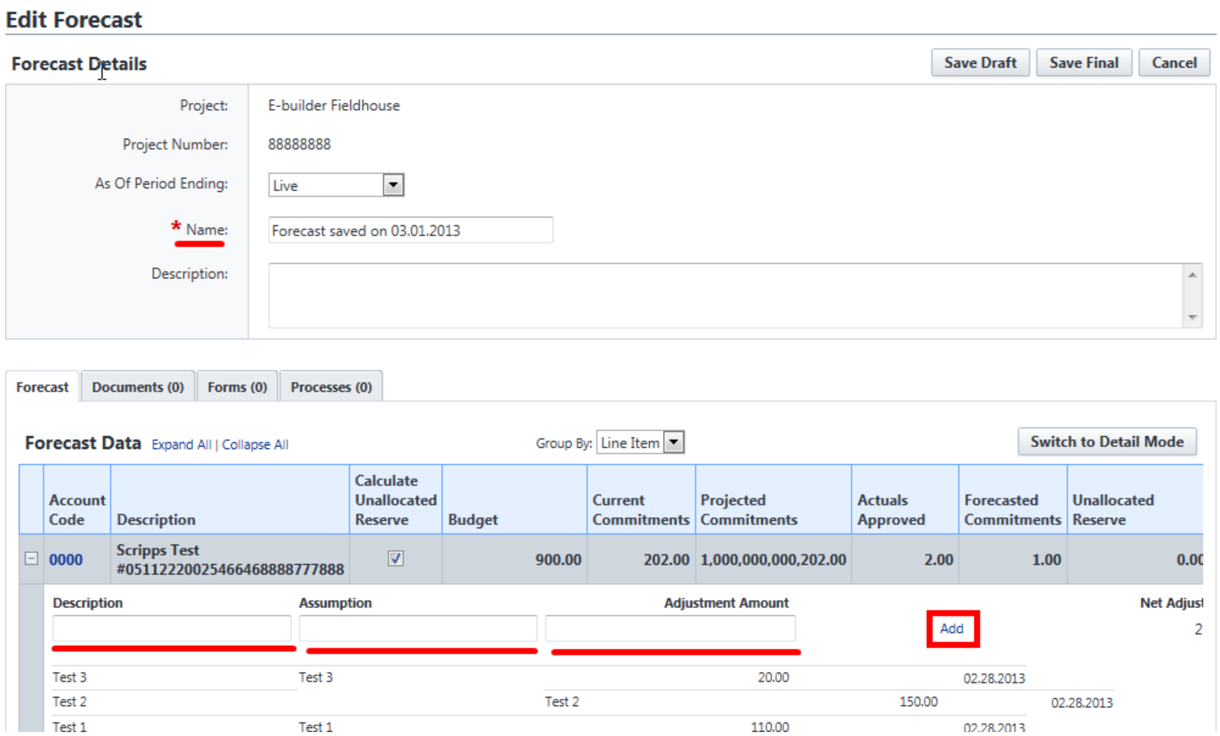
6. *Click the **Switch to Adjustment Mode** button.*



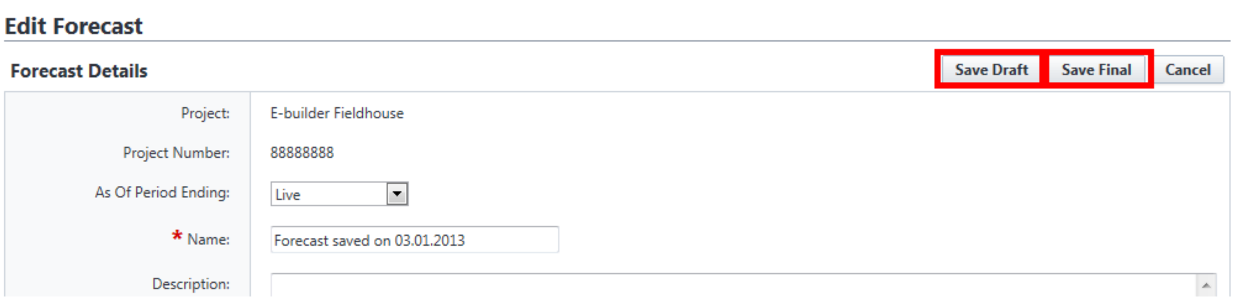
7. *A required name is auto-generated but can be changed if desired.*
8. *The 'Calculate Unallocated Reserve' check-box is checked by default. The 'Unallocated Reserve' is the difference between budget and projected commitments. A 'check' in this box yields an 'Estimate at Completion' that is equal to your budget, assuming that your project will finish on budget.*
9. *De-select the 'Calculate Unallocated Reserve' check-box when you are ready to begin forecasting by adjusting your 'Estimate at Completion'.*

NOTE: Adjustments can be entered as negative values. When an adjustment is reflected in e-Builder via a Commitment or Change Order process, access the forecast for the appropriate budget line item and enter a negative value equal to the Commitment or Change Order value to ensure that your 'Estimate at Completion' is adjusted accordingly.

10. *Enter a description, assumption, and adjustment amount then click the **Add** link.*



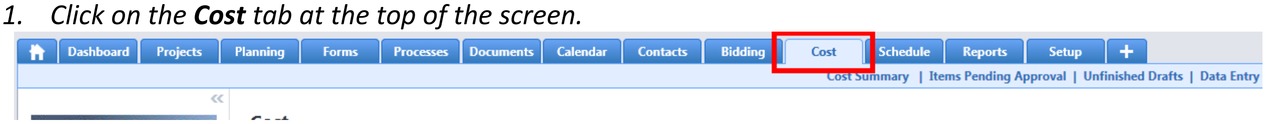
11. *When you have completed your forecast, click the **Save Draft** or **Save Final** button.*



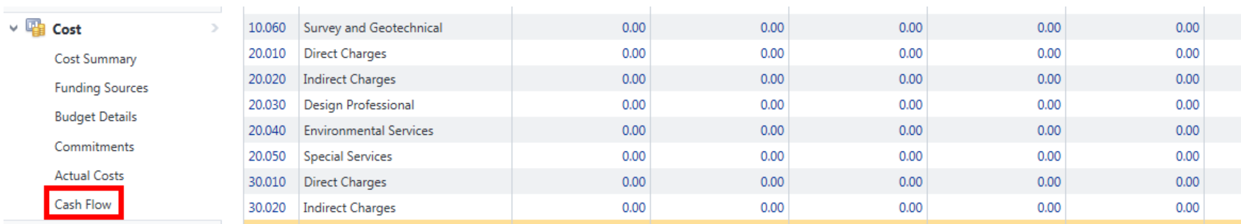
Cash Flow

The Cash Flow feature in e-Builder provides the ability to estimate the expected cash needs/ future expenditures for the remaining life span of the project. Cash flow projections are established by month at the budget line item detail.

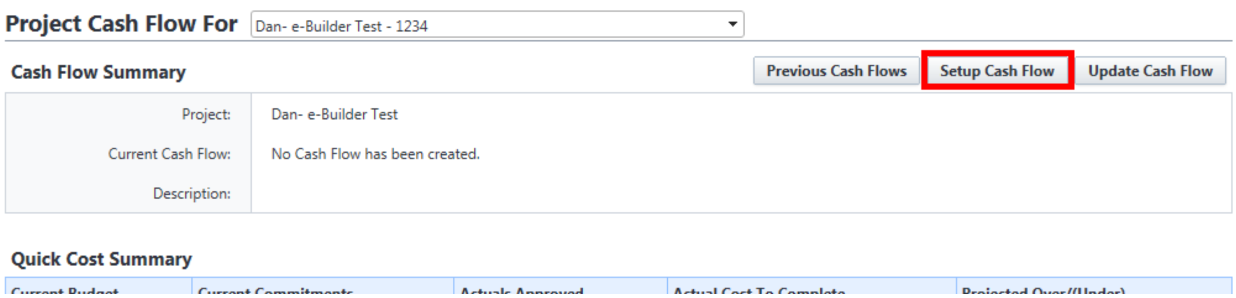
1. *Click on the **Cost** tab at the top of the screen.*



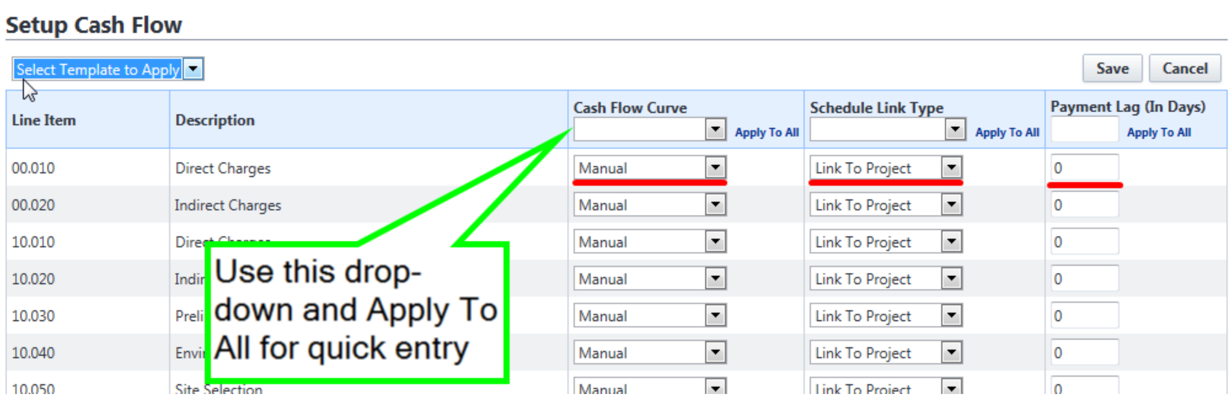
2. *Select the project for which you would like to create a Cash Flow.*
3. *Click the **Cash Flow** link under the Cost Menu on the left side of the screen.*



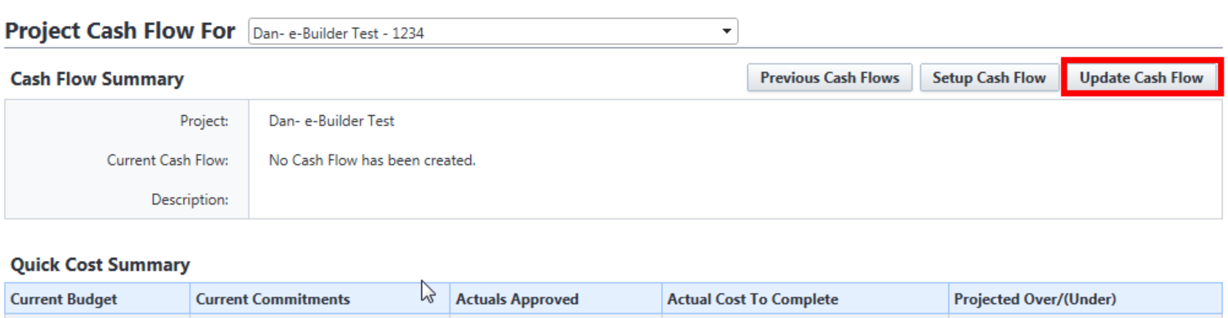
4. *Click on the **Setup Cash Flow** button.*



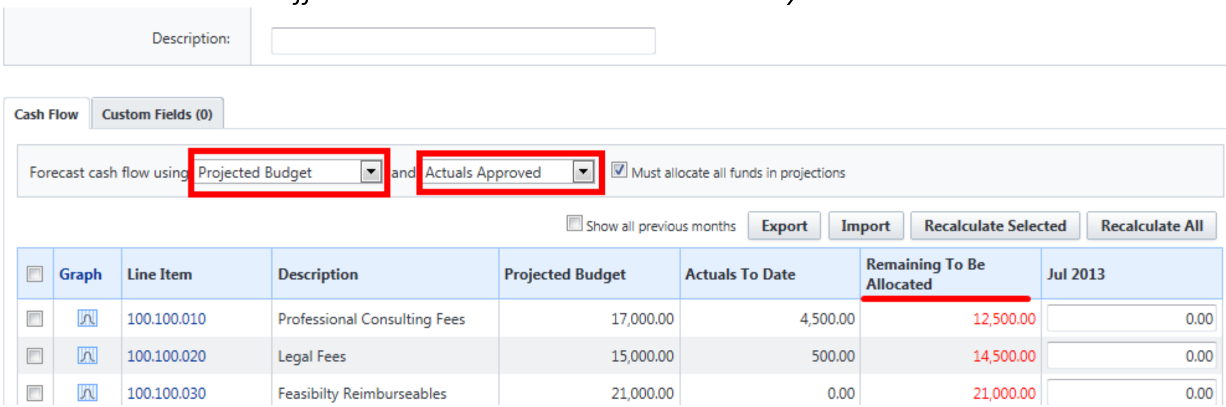
5. *For each budget line item, choose a Cash Flow Curve and a Schedule Link Type. Click **Save**. (A Manual cash flow curve will require a manually entered amount for each month on the budget line item. The Schedule Link type indicates the duration for which you would like to forecast your cash flow.)*



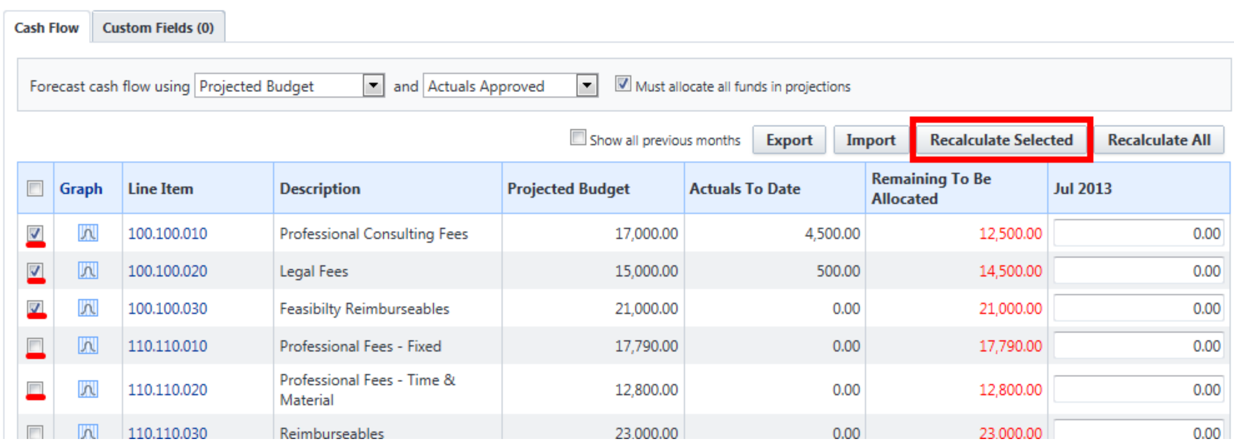
6. *Click the **Update Cash Flow** button.*



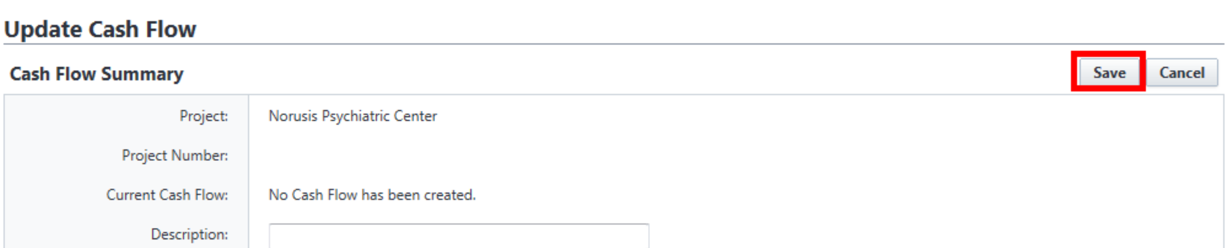
7. *Select the two options for which you would like to 'Forecast cash flow using.' Your remaining to be allocated will be the difference between the two selections that you have made.*



8. *Place a 'check' next to the budget line items that you would like to forecast and click the **Recalculate Selected** button. If you would like to calculate all line items, click the **Recalculate All** button (Monthly amounts for budget line items that have been setup with a Manual cash flow curve will need to be entered manually. Monthly amounts that are automatically calculated can be overwritten with a manual entry).*



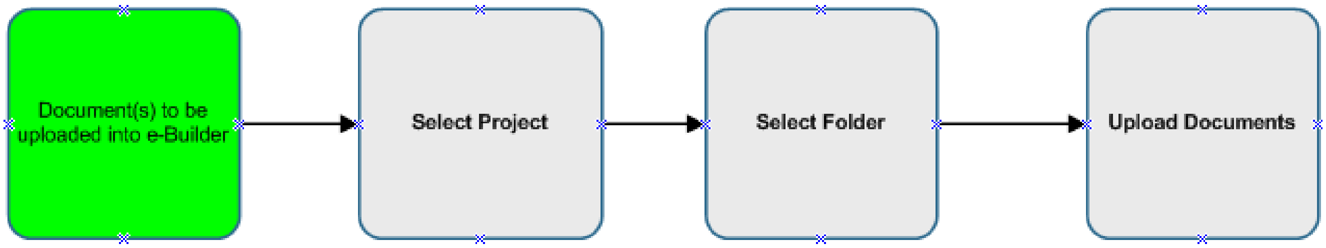
9. *Click **Save**.*



Documents Module

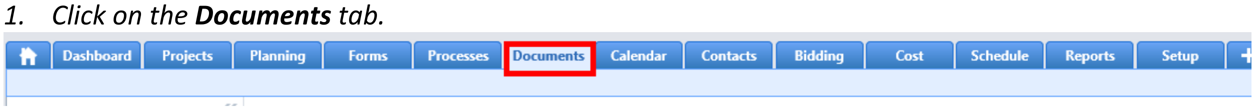
The Documents module is a file repository for all documents related to your projects. It can be compared to an electronic version of a paper filing cabinet or a network drive where documents are stored. The folder structure can be created any way the project team members need it to be. One of the key advantages of using the Documents module is that all members of a project can access the most up-to-date files from any location at any time.

Uploading Documents

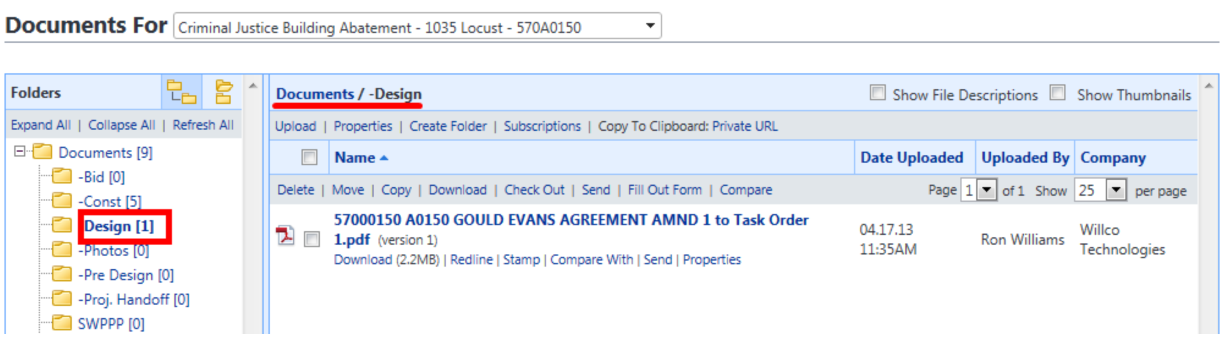


To upload files one at a time:

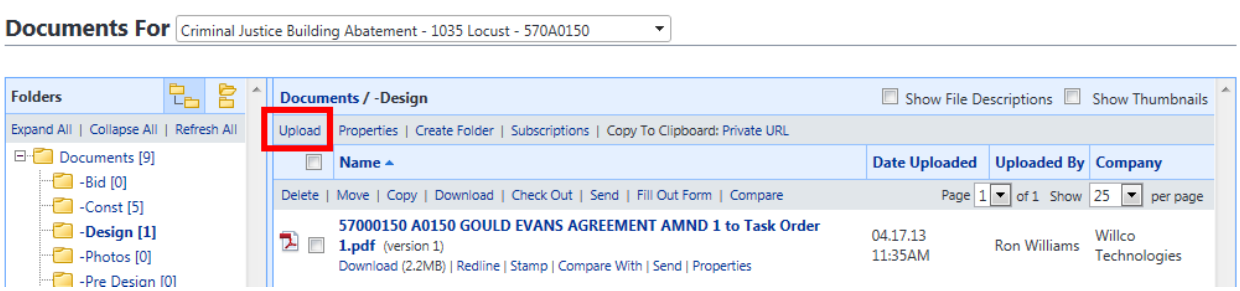
1. *Click on the **Documents** tab.*



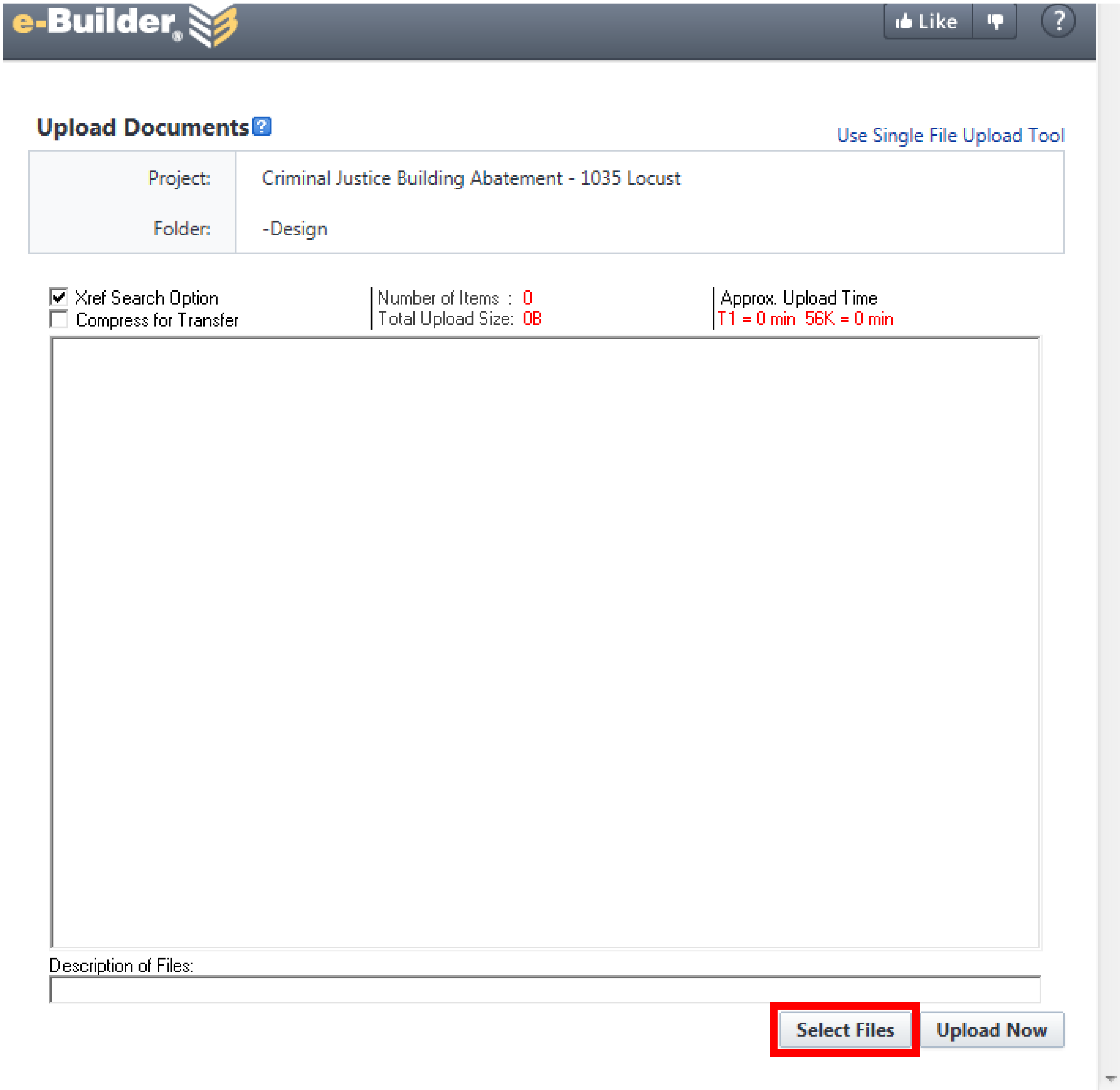
2. *Select the project you wish to upload the documents to.*
3. *Select the folder you wish to upload documents into.*



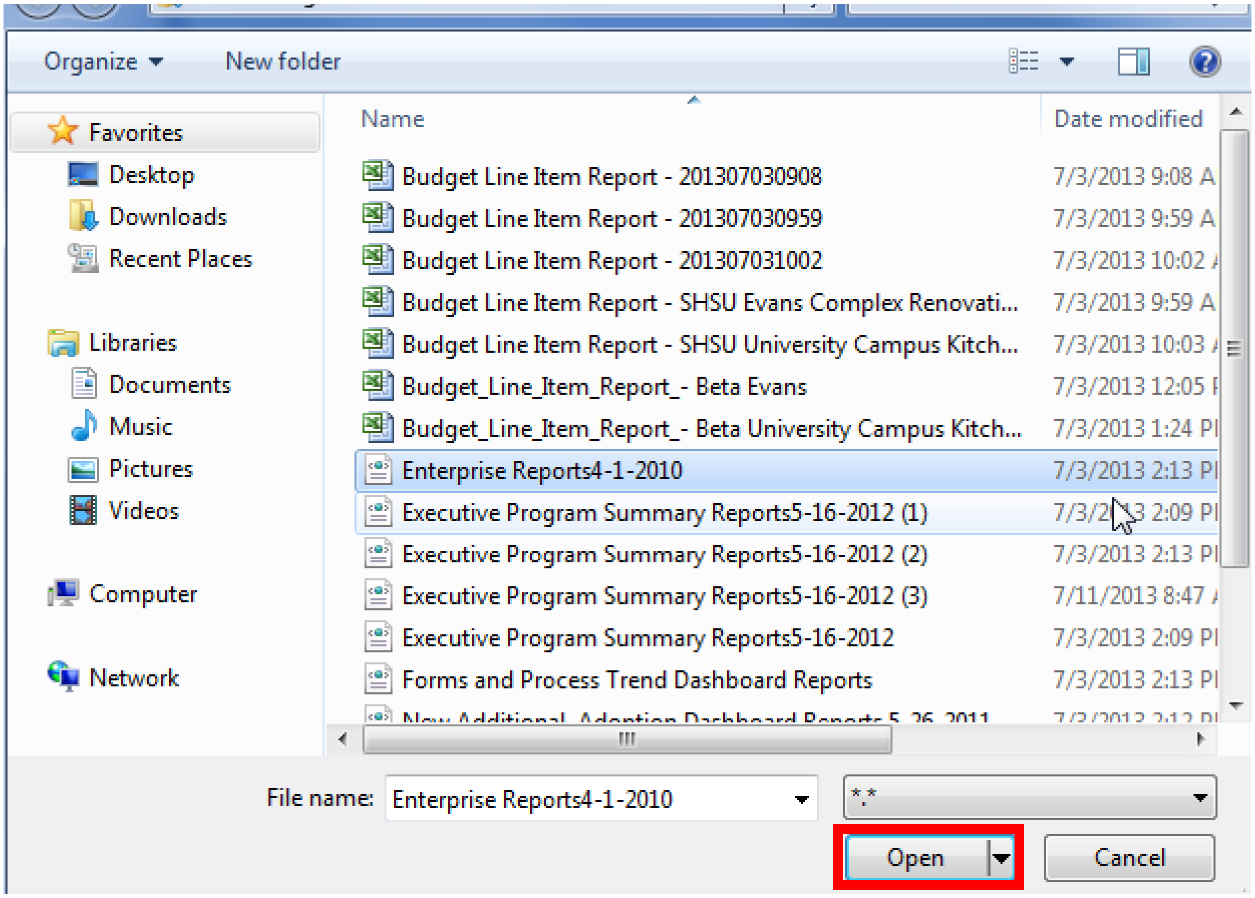
2. *Click the **Upload** link.*



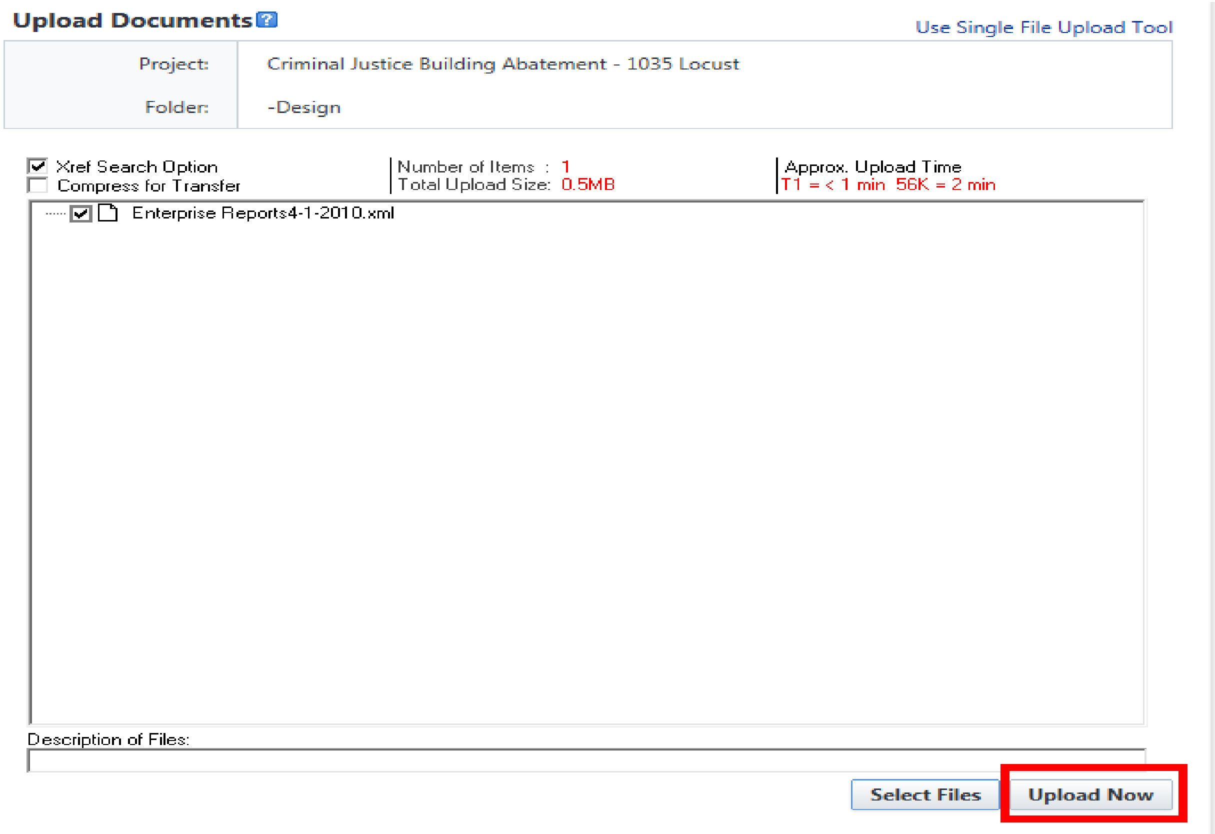
4. *In the Upload Documents Window, click **Select Files**.*



5. *Select a file on your computer and press **Open**.*

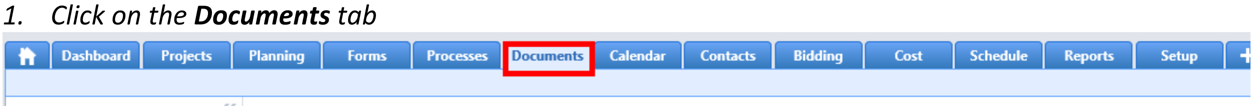


6. *Click the **Upload Now** button.*

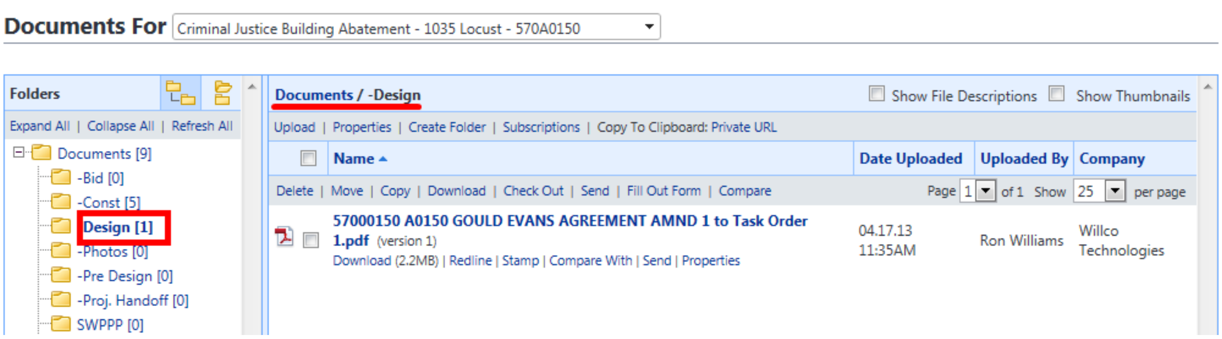


To upload multiple files:

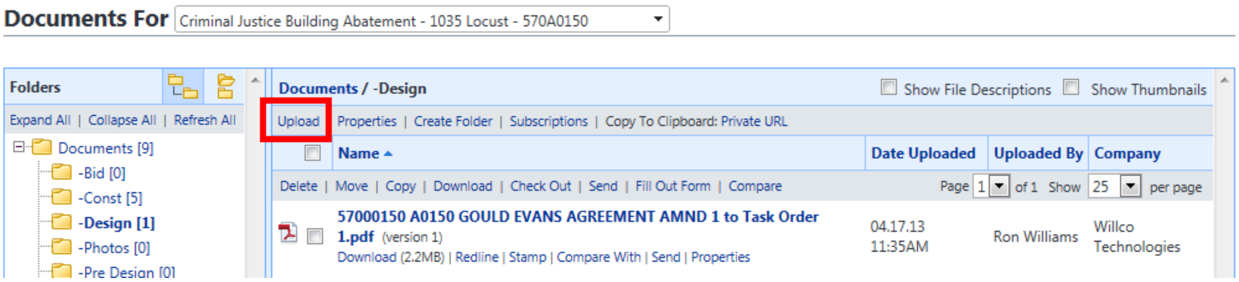
1. *Click on the **Documents** tab*



2. *Select the project you wish to upload the documents to.*
3. *Select the folder you wish to upload documents into*

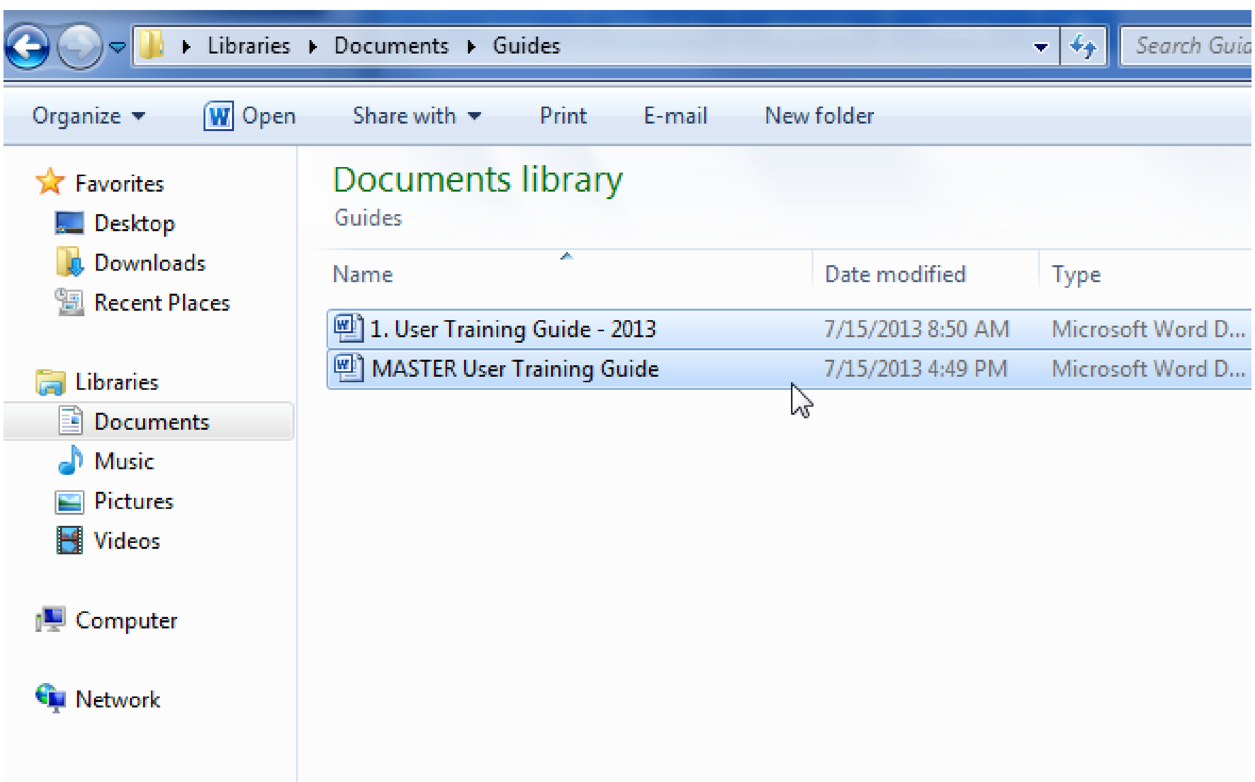


4. *Click the **Upload** link.*

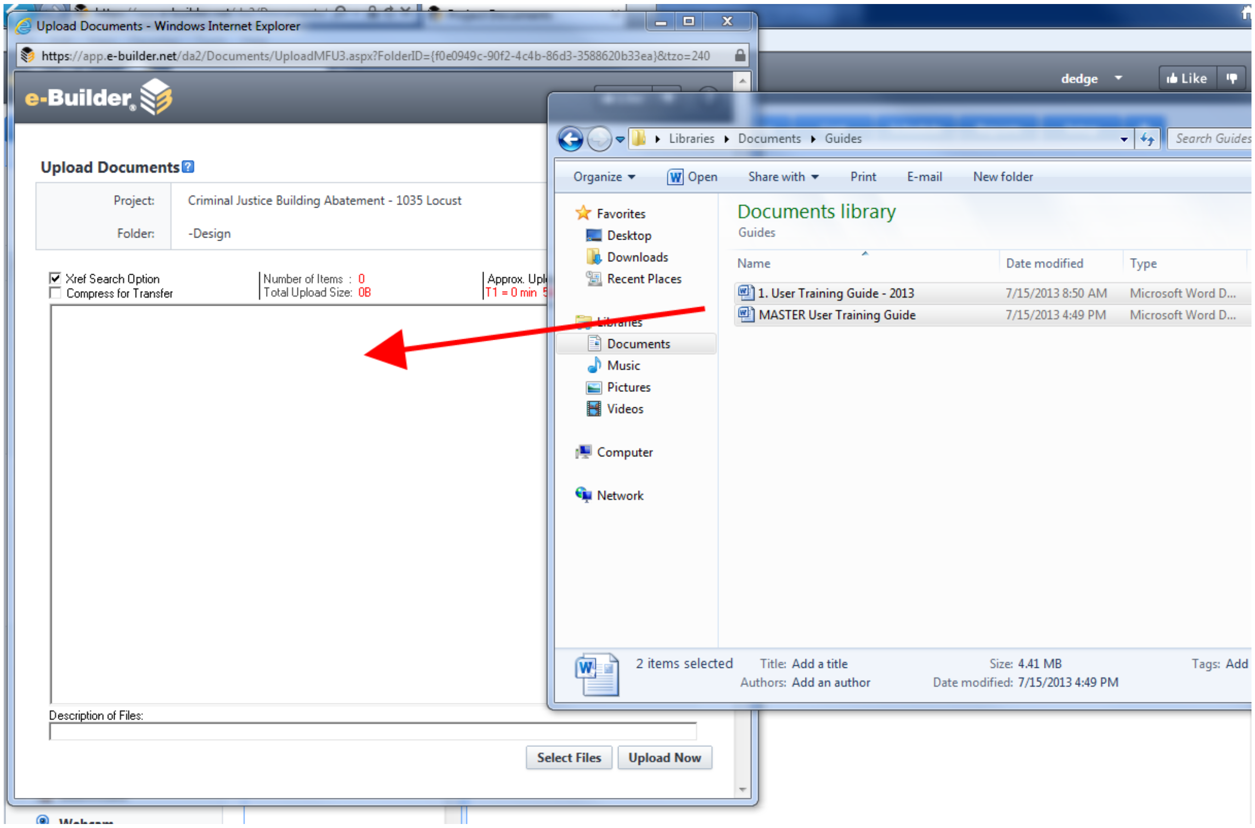


5. *Open Window Explorer on computer.*

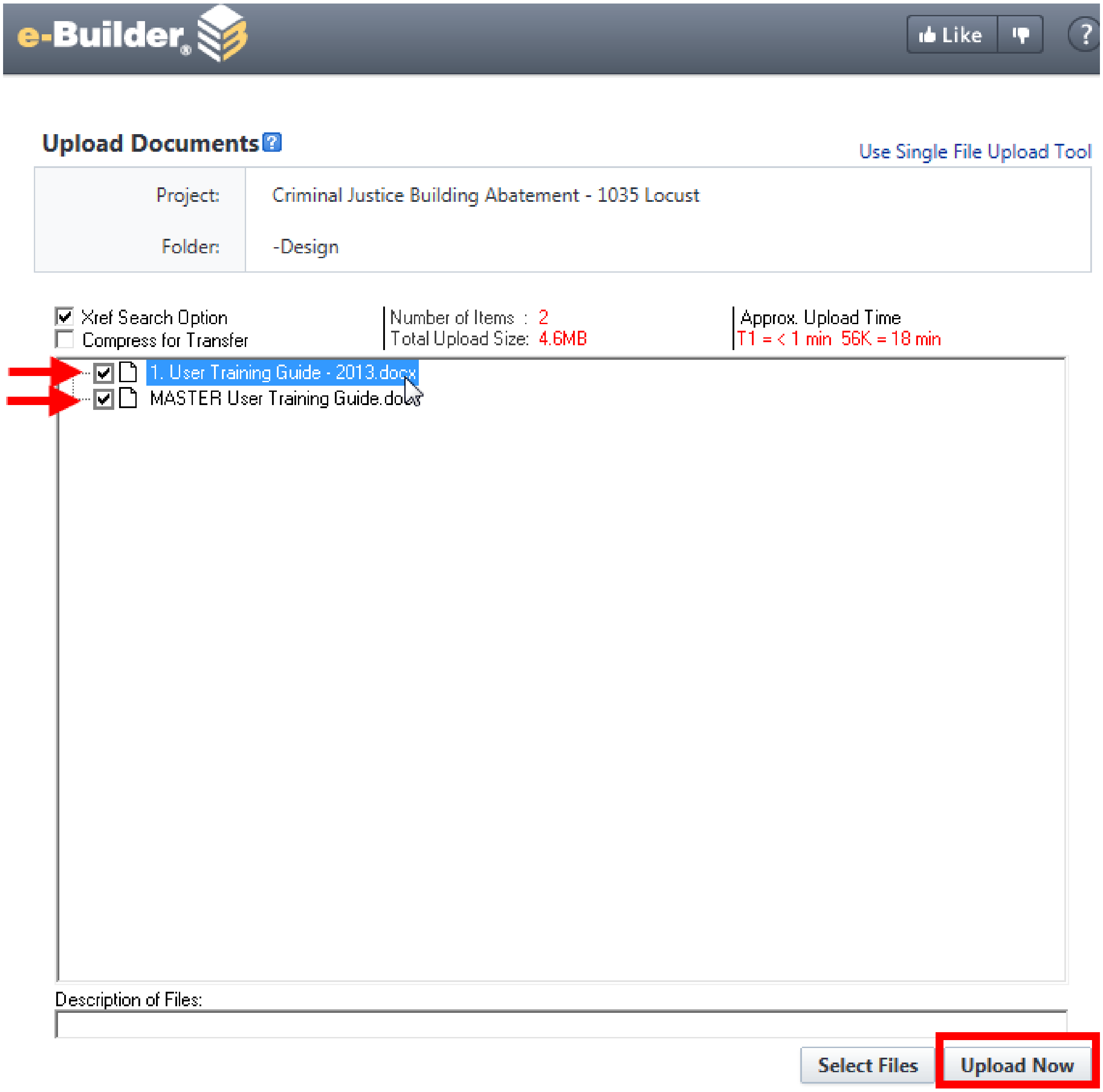
6. *Select multiple files by holding down the control key and selecting the individual files*



7. *Drag and drop selected files into e-Builder upload window.*

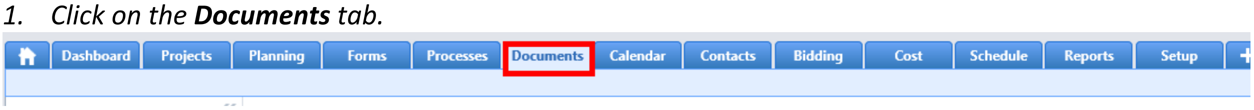


8. *Use the check boxes on the left to select files to upload and press* ***Upload Now****.*

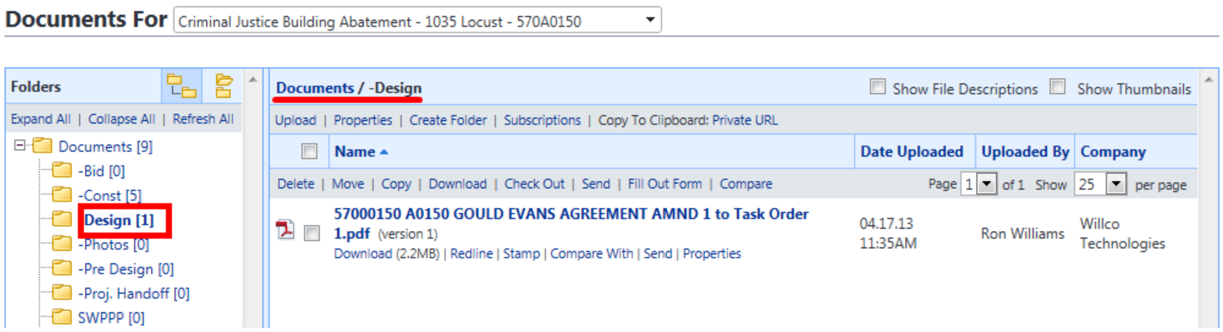


Viewing Documents

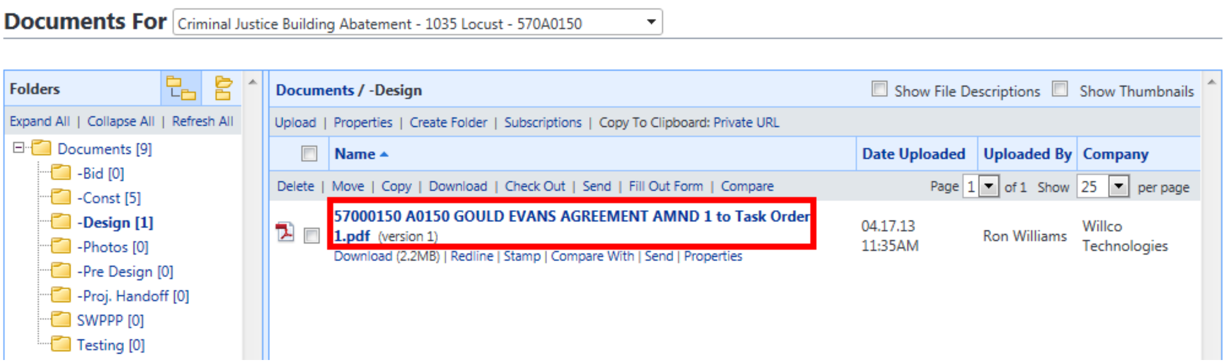
1. *Click on the **Documents** tab.*



2. *Select the project containing the documents you wish to view.*
3. *Navigate to desired documents by selecting appropriate folder.*



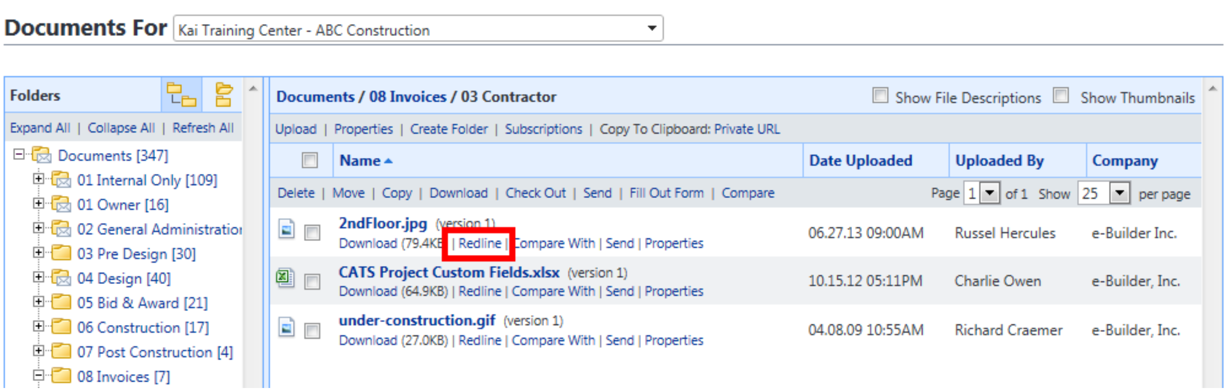
4. *View document by clicking bold text of document.*



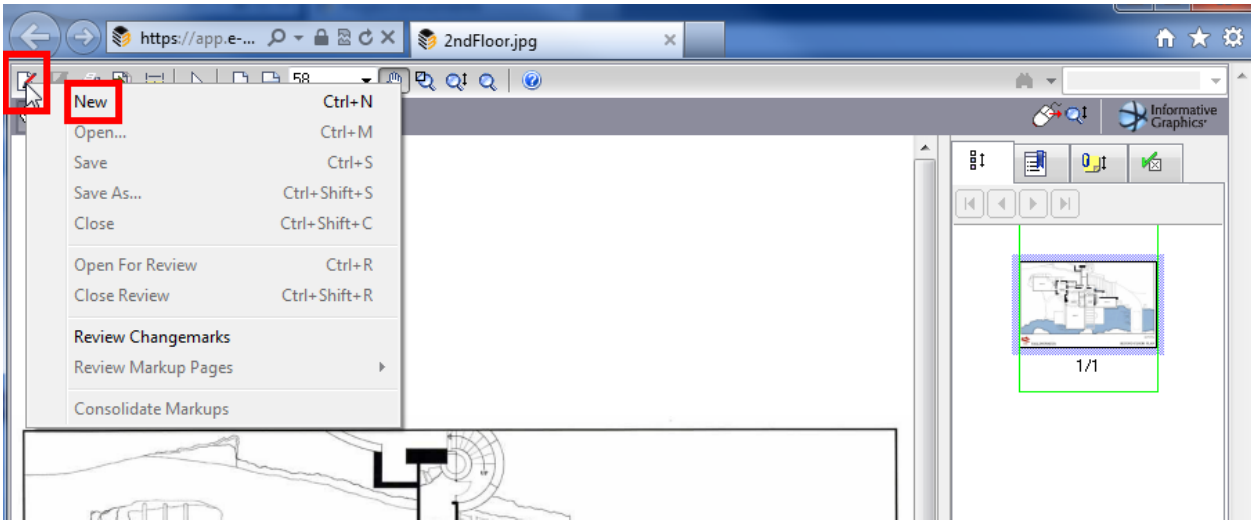
Redlining Documents

Any document stored in e-Builder can be redlined. Redlining a document means to create a markup layer that lives in e-Builder and does not alter the native file.

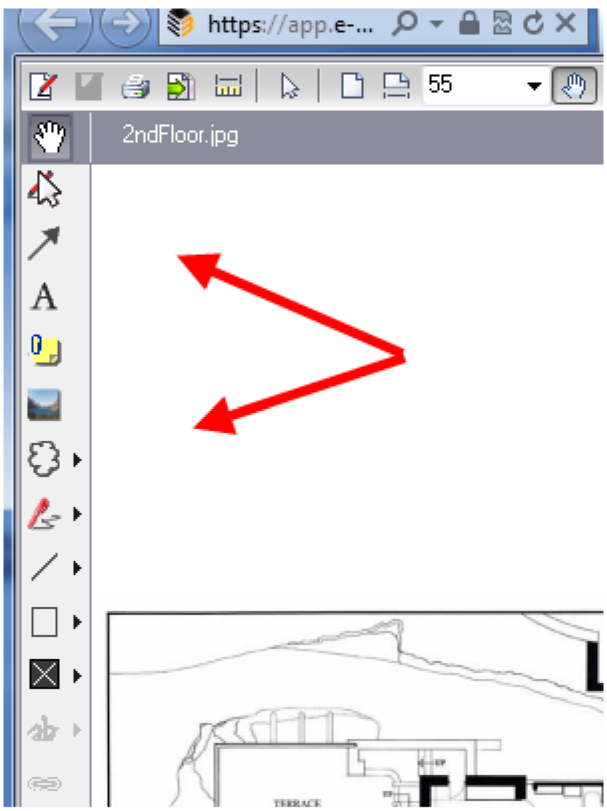
1. *Click on the name of the folder where the document is stored. (See Viewing Documents above if needed)*
2. *Click on the* ***Redline*** *link below the file name. A new window opens.*



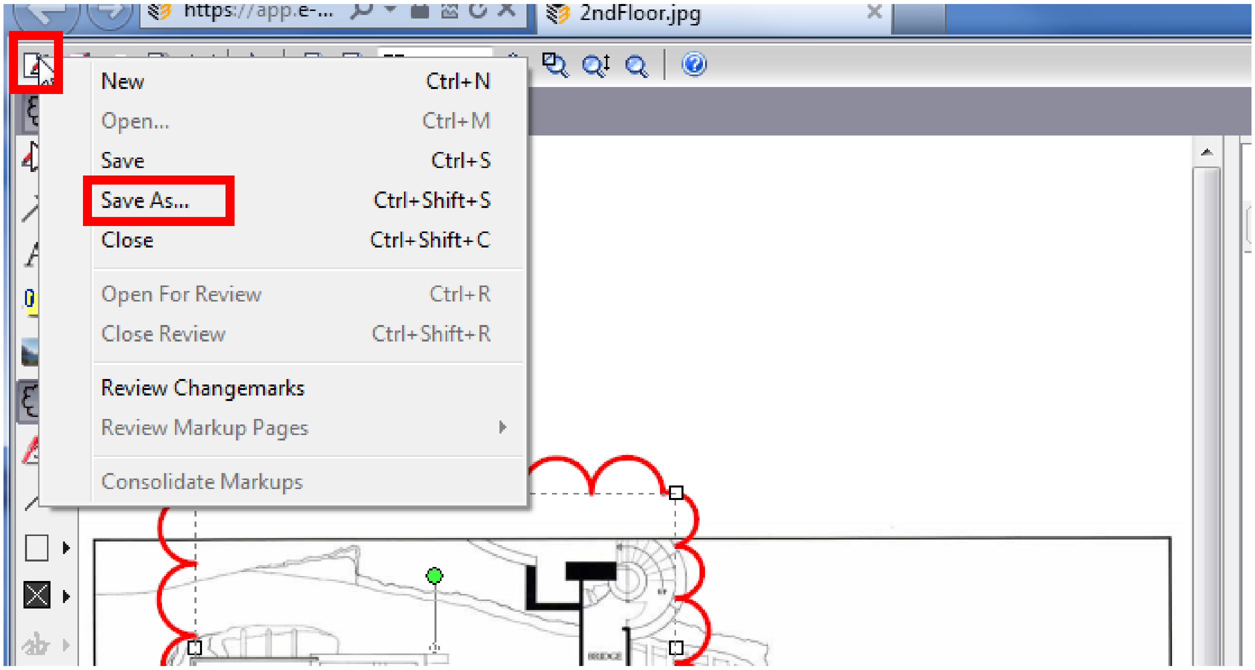
3. *Click the* ***Markup Icon*** *and select* ***New****.*



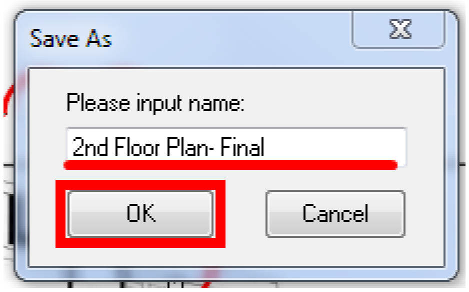
4. *Use the tools on the left-hand side of screen to mark up the file.*



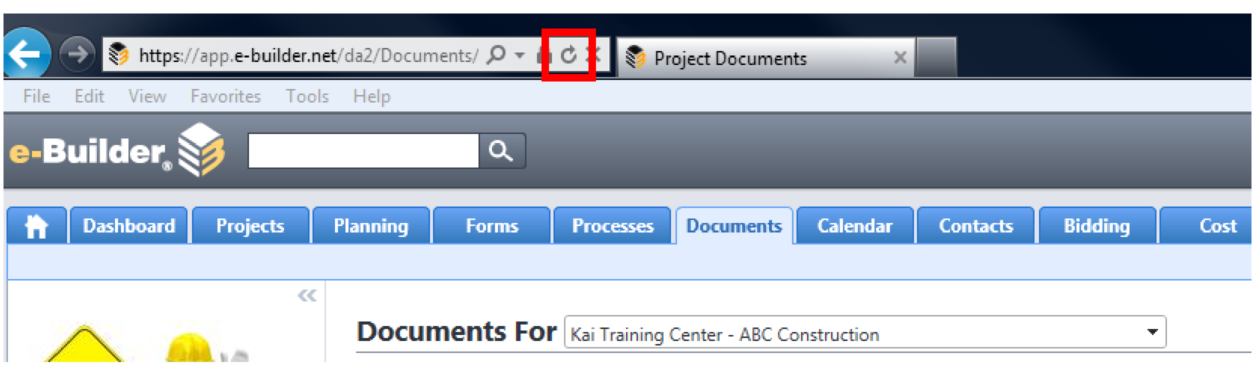
5. *Click the **Markup icon** again and select **Save As**.*



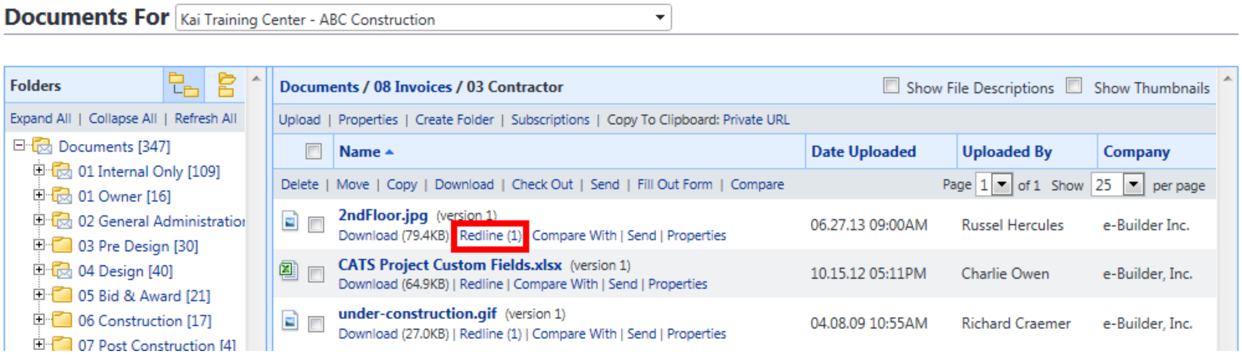
6. *Enter the name of your markup and click **OK**.*



7. *The user can exit out of the window now.*
8. *To view the redline, refresh the documents page (if necessary).*



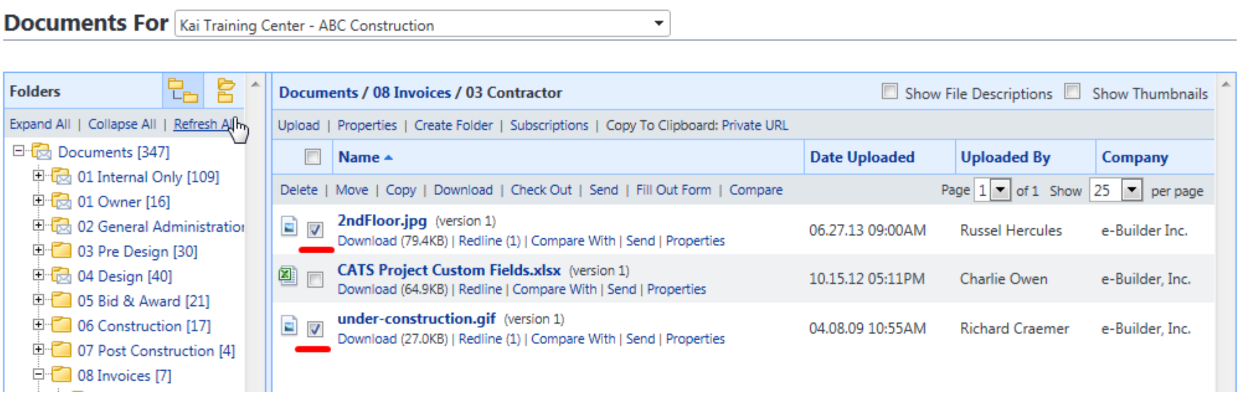
9. *Navigate to the document by selecting appropriate folder.*
10. *Beneath the document, the user will see that the redline version is incremented by 1. (Redline(1))*
11. *Select the **Redline(1)** link to view marked up version of document.*



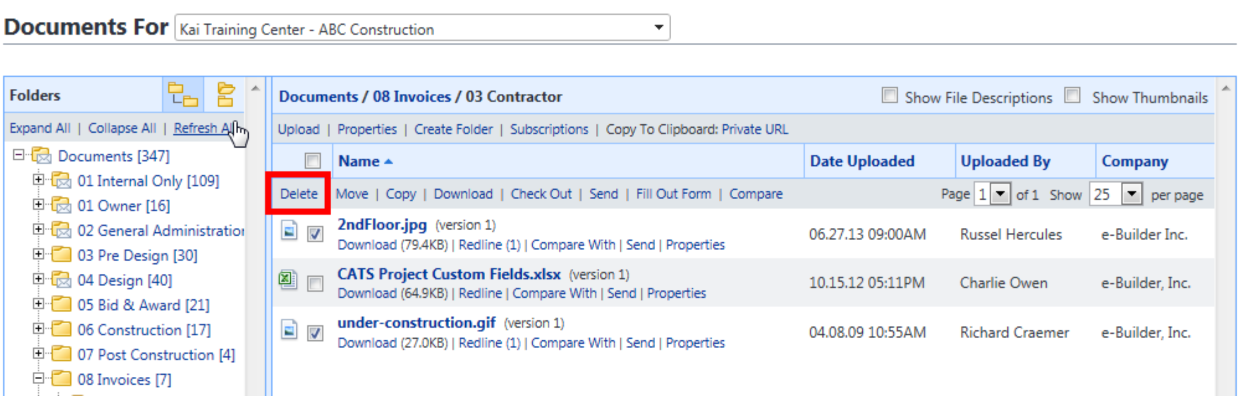
Deleting Documents

*Note: Users can only delete documents if their permissions allow them to do so. If special attention is required, contact e-Builder Administrator.

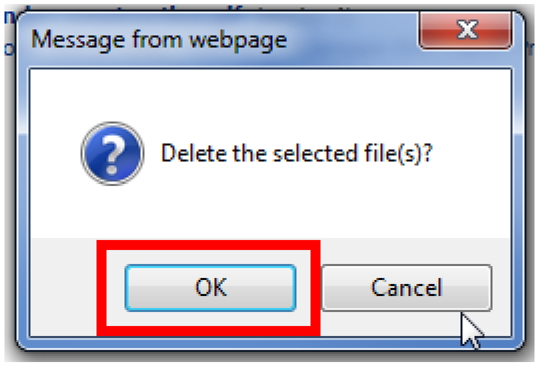
1. *Click on the name of the folder where the document is stored. (See Viewing Documents above if needed)*
2. *Check the check boxes next to the files to be deleted.*



3. *Click on the* ***Delete*** *link.*



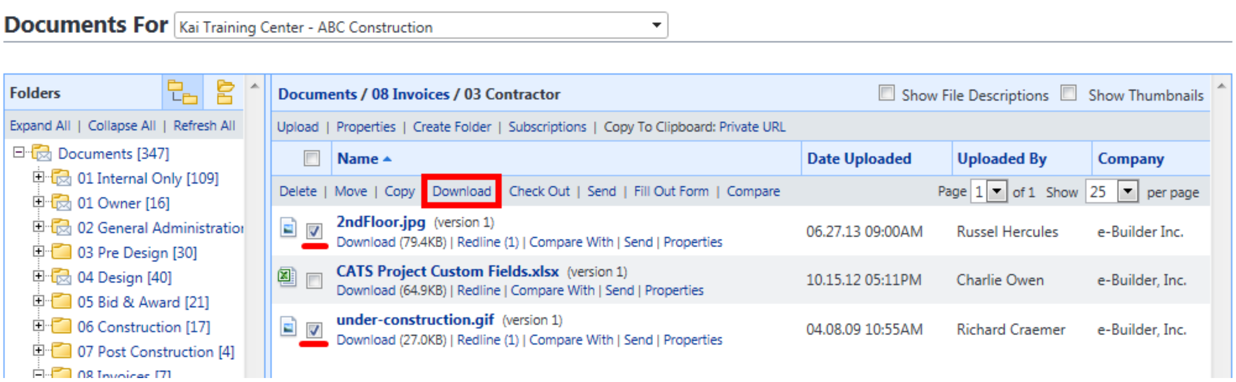
4. *Click the* ***OK*** *button. The selection will be deleted.*



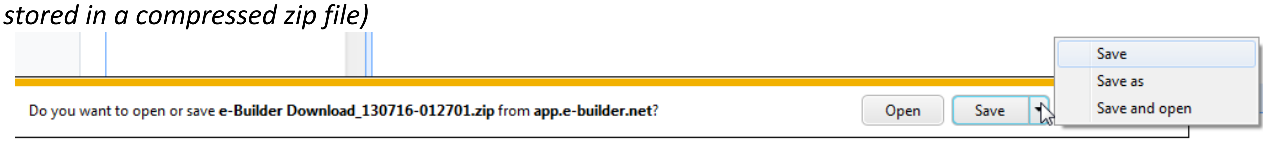
* Documents in e-Builder can be deleted however no documents are permanently deleted as they can be recovered by your e-Builder Administrator or Project Administrator.

Downloading Documents

1. *Click on the name of the folder where the document is stored. (See Viewing Documents above if needed)*
2. *Select the check boxes next to the files to be downloaded and click on the* ***Download*** *link.*



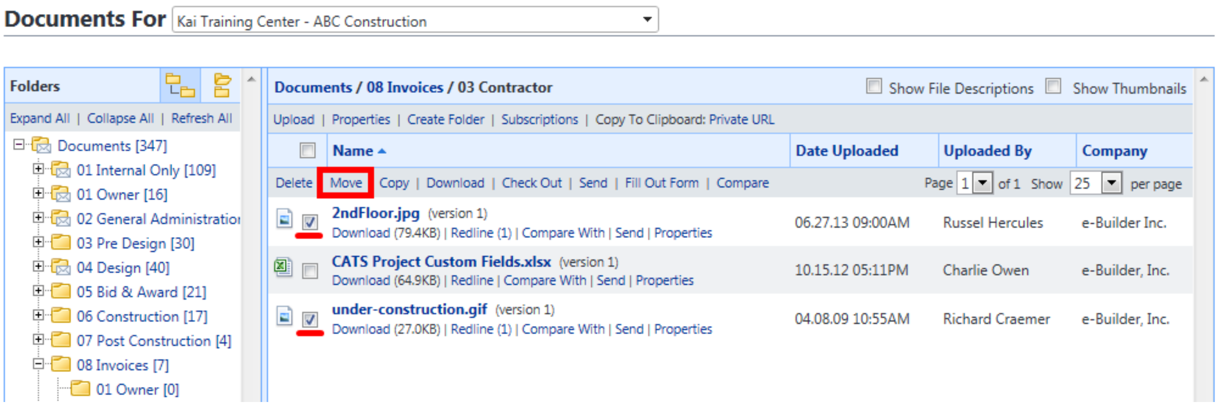
3. *The user can choose to open, save, save as, or save and open. (If multiple files are selected, files are stored in a compressed zip file)*



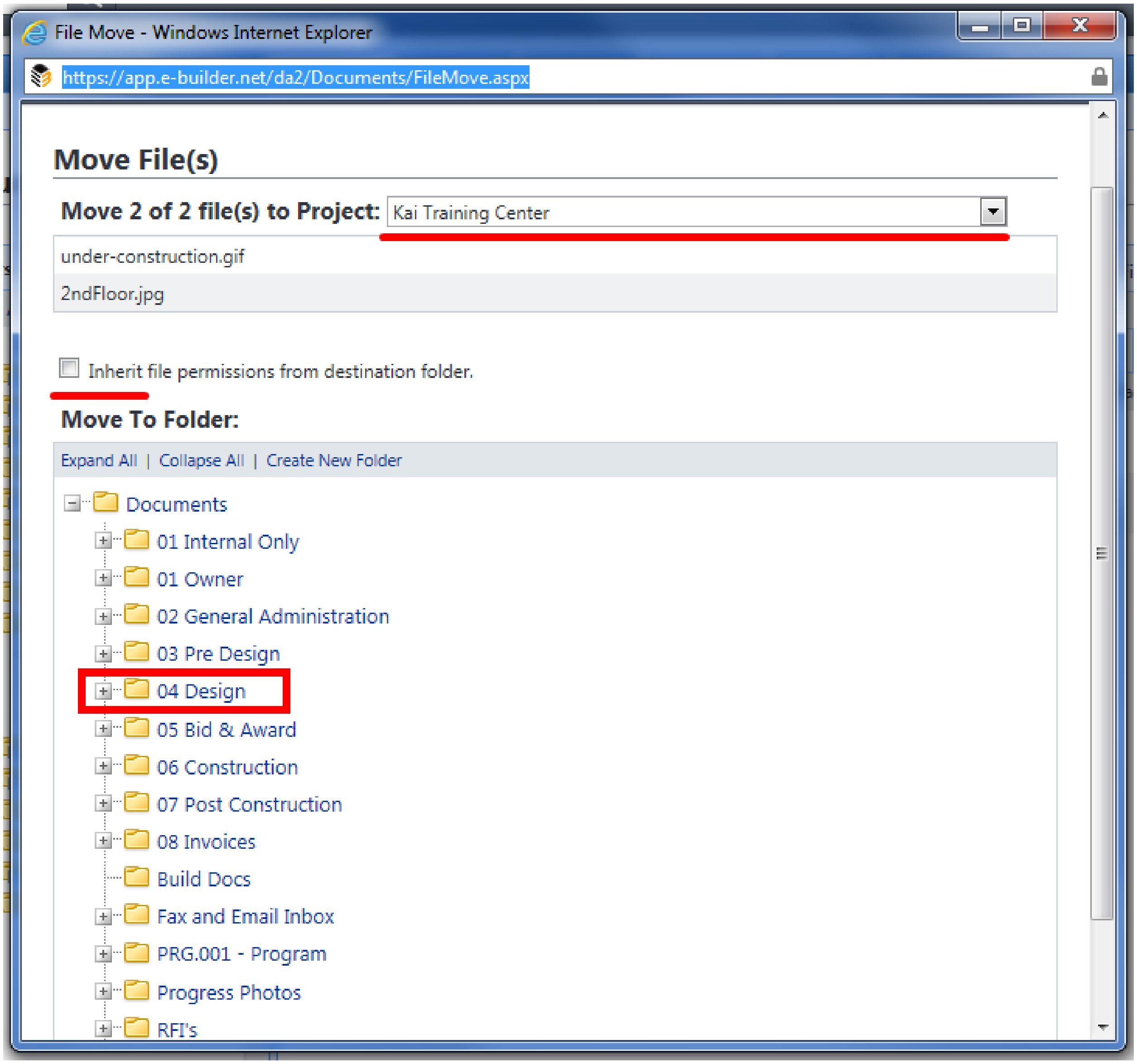
Moving Documents

Files stored in e-Builder can be moved from one folder to another within the same project. When a file is moved, all of the history recorded on it will move with it.

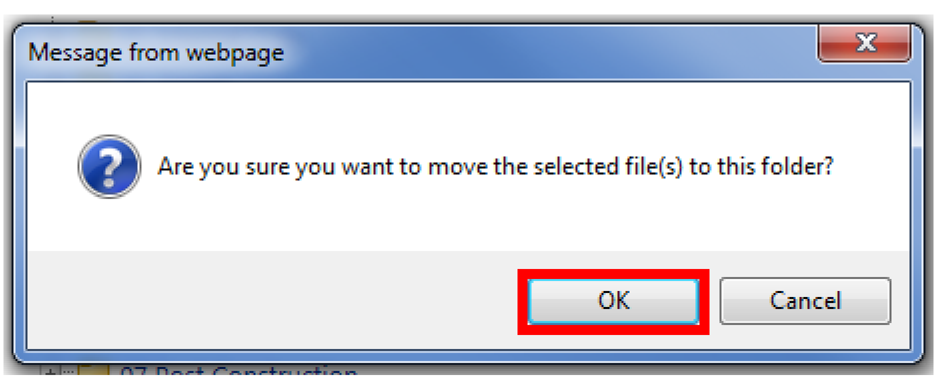
1. *Click on the name of the folder where the document is stored. (See Viewing Documents above if needed)*
2. *Select the checkboxes next to the names of the files, and click the* ***Move*** *link.*



3. *A new Internet Explorer window will open that will prompt you to select the folder that the files are to be moved to. The user can choose to move it to a different project by selecting that project from the drop down menu. The documents will retain current permissions unless "Inherit file permissions from destination folder" checkbox is checked.*



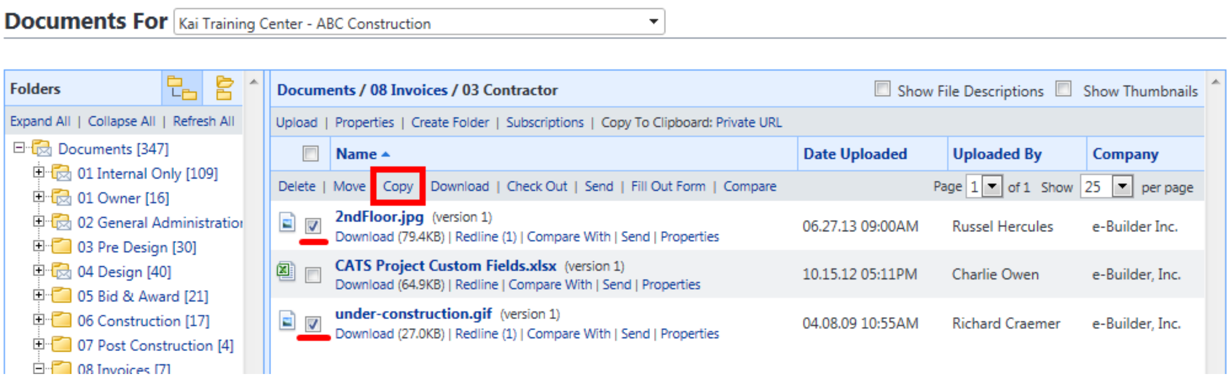
4. *Click on the link of the new folder's name. Click **Ok** to confirm file move.*



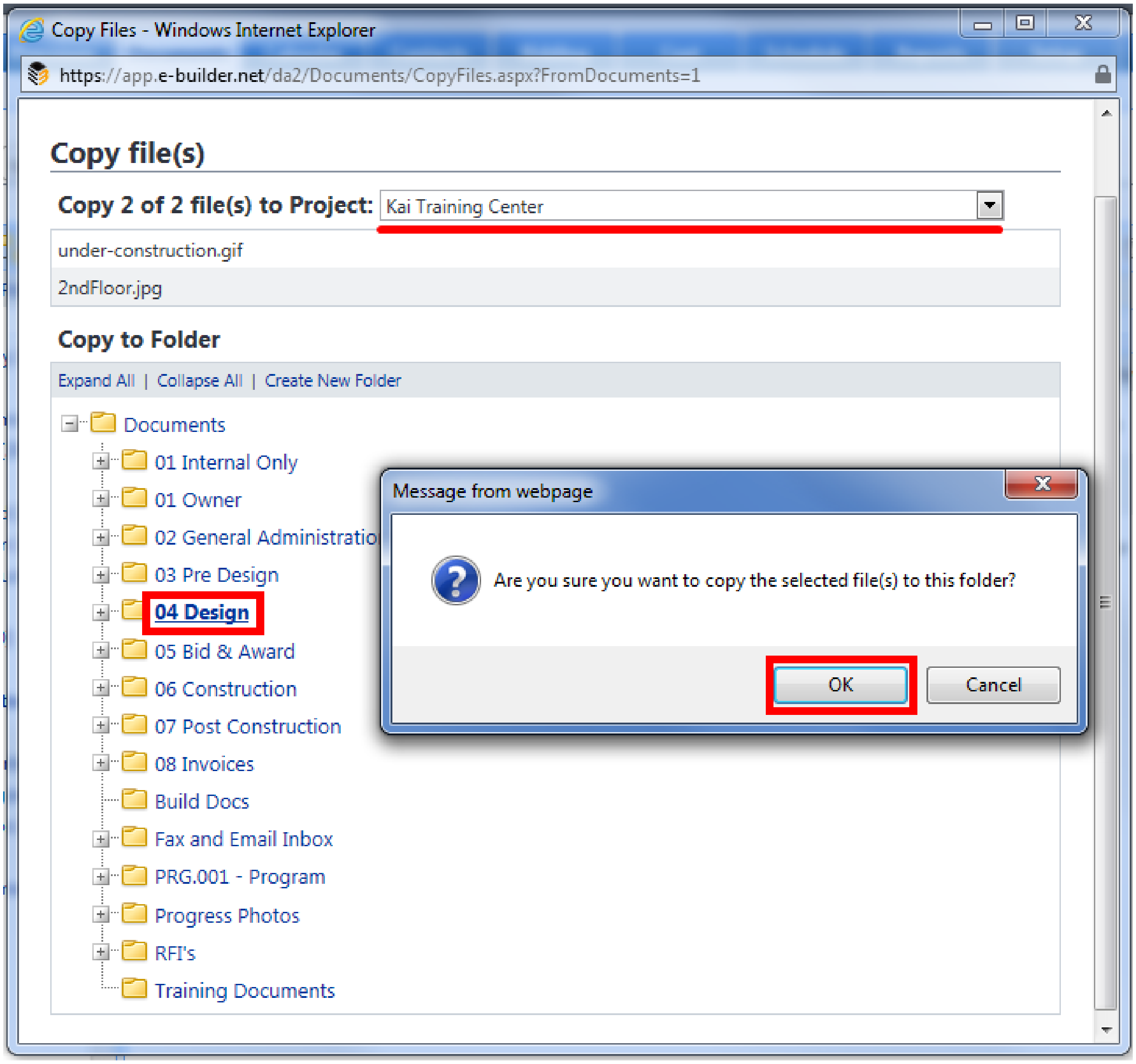
Copying Documents

Files stored in e-Builder can be copied from one folder to another within the same project or copied to another project. When a file is copied, all of the history that has been recorded on it will start again with the new document.

1. *Click on the name of the folder where the document is stored. (See Viewing Documents above if needed)*
2. *Select the check boxes next to the names of the files.(See Moving Documents above if needed)*
3. *Click the **Copy** link. A new window will open.*



4. *A new Internet Explorer window will open that will prompt you to select the folder that the files are to be copied to. The user can choose to move it to a different project by selecting that project from the drop down menu.*

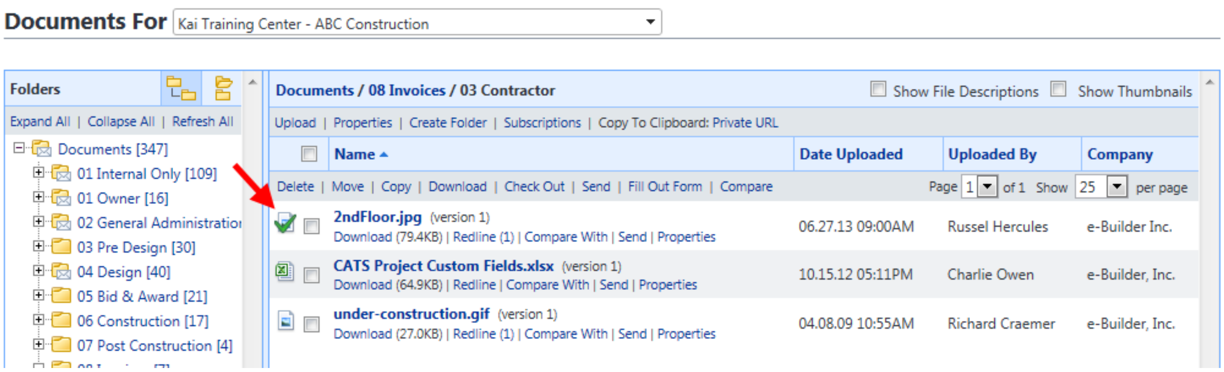


5. *Click on the link of the new folder's name and click **OK**.*

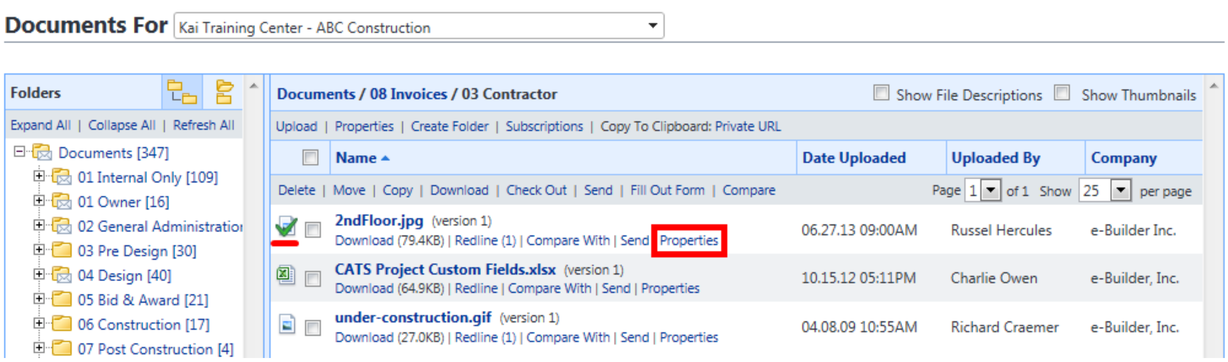
Checking Out Documents

The Check Out feature in e-Builder allows users 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 yet they maintain rights to view it.   The benefit of using this feature is that all users are informed that one user is making updates to the file, so they are prevented from uploading changes to it while that user has it checked out.

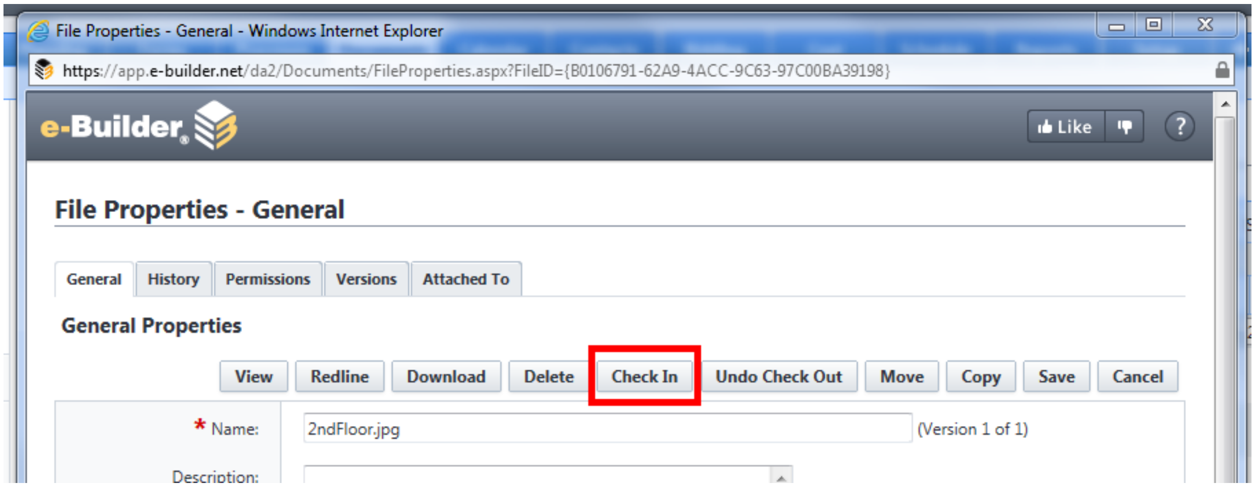
1. *Click on the name of the folder where the document is stored. (See Viewing Documents above if needed)*
2. *Select the checkboxes next to the names of the files and click the **Check Out** link. A check mark is displayed over the icon corresponding to the checked out file.*



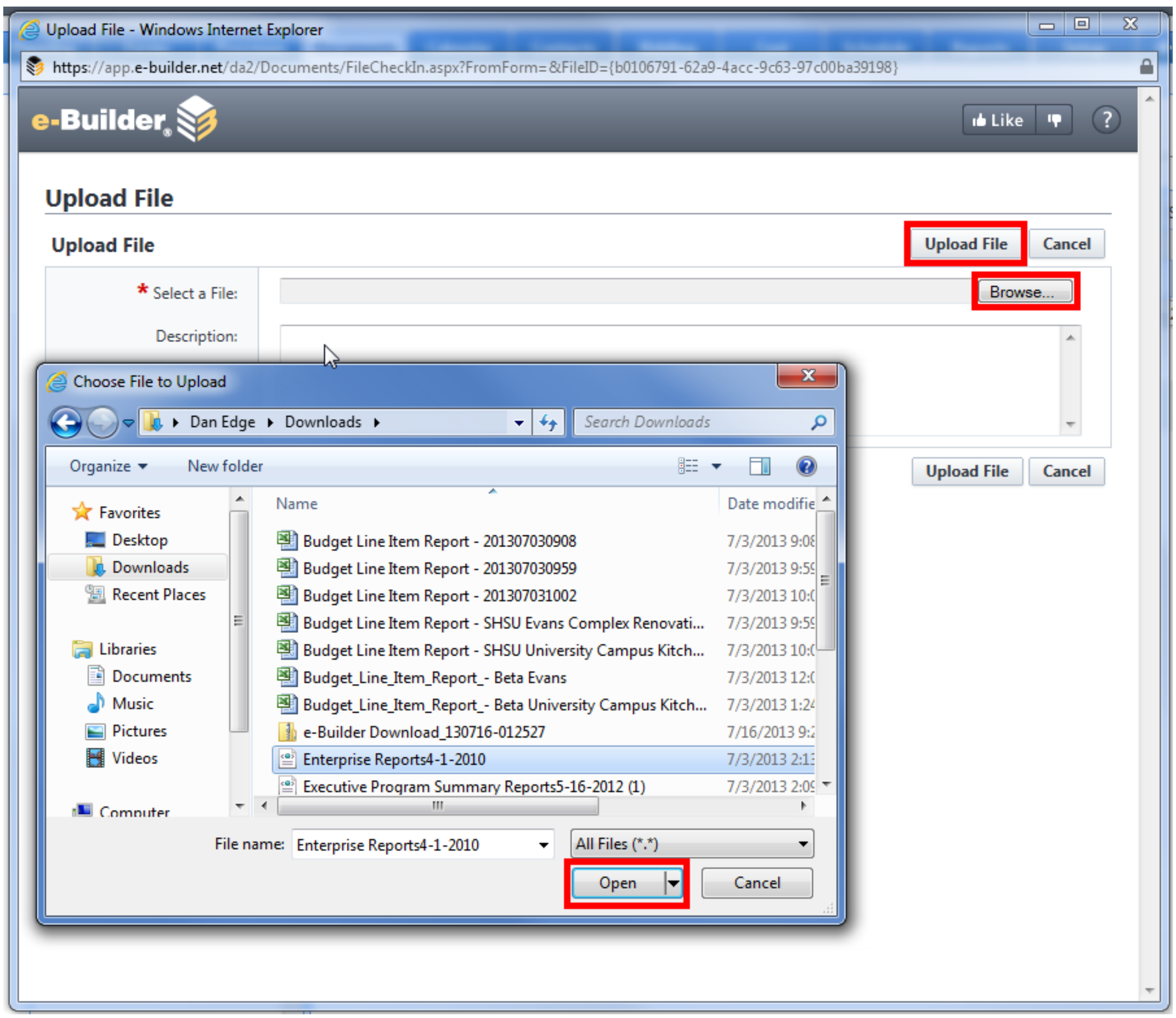
3. *Any changes can be made to the document and the document can be renamed if desired. Save document to computer.*
4. *To undo Check Out, click the **Properties** link beneath the checked out document.*



5. *Select the **Check In** option.*



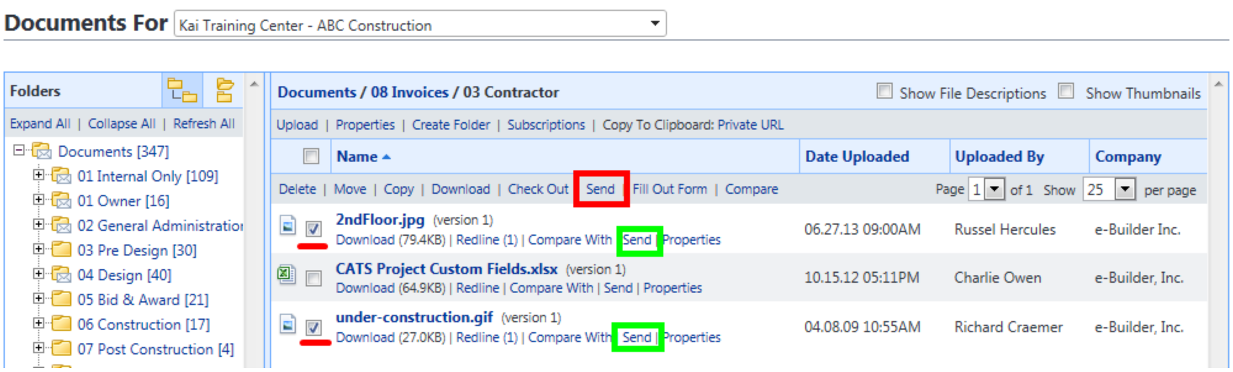
*6. Select **Browse**, locate saved file, and select **Upload File**.*



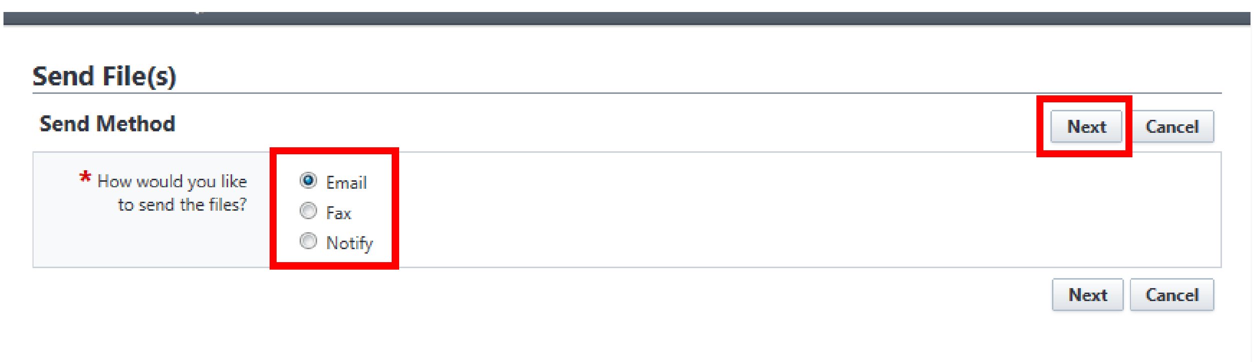
Sending Documents

To send files to a party who may not have access to e-Builder or to a specific folder on a project, e-mail the files directly from the Documents module either individually or in groups. Only files in the same folder can be e-mailed, faxed or have notifications sent about them together.

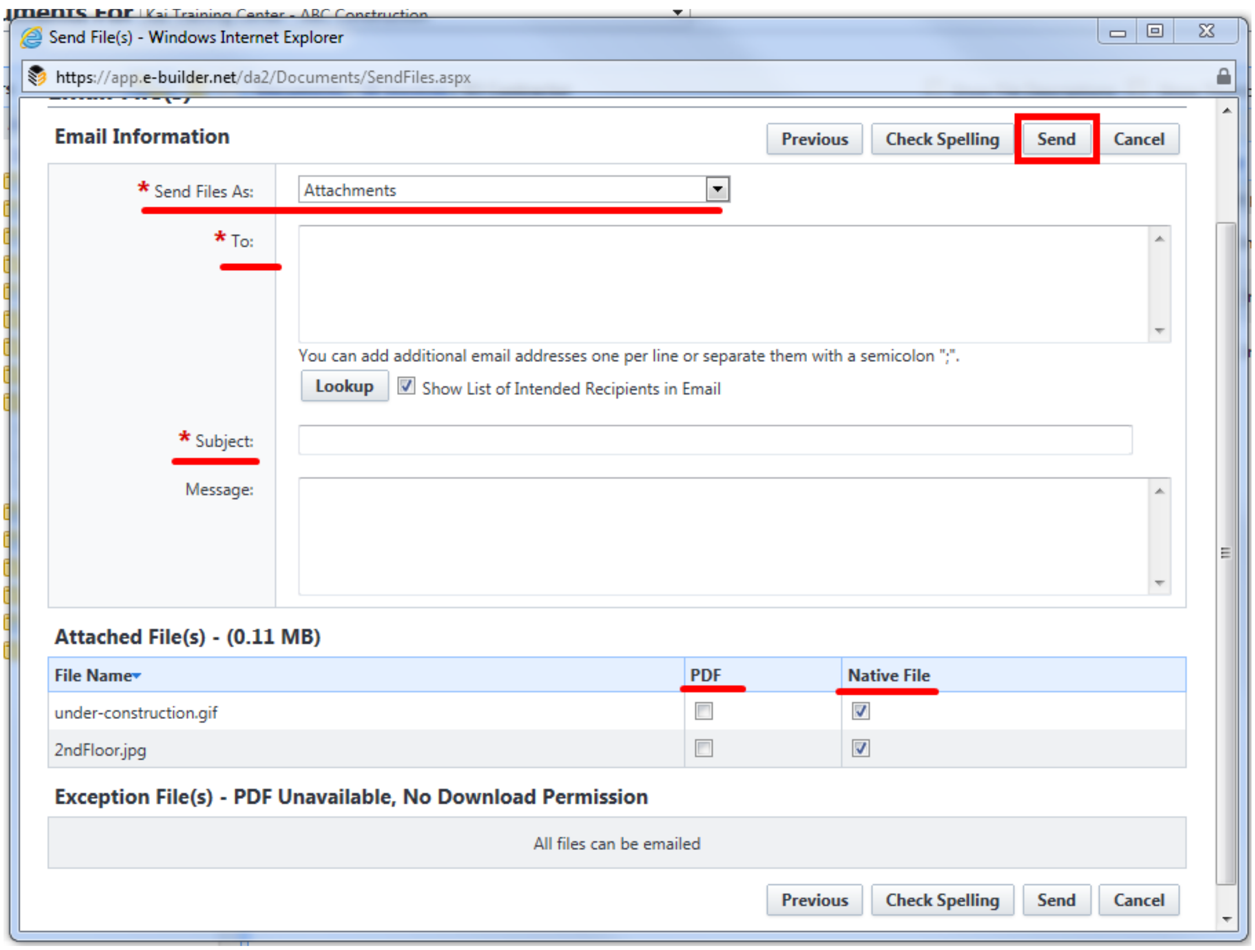
1. *Click on the name of the folder where the file is stored. (See Viewing Documents above if needed)*
2. *Click on the **Send** link underneath the file name to send a single file or select checkboxes of files to be sent and press **Send** in the header.*



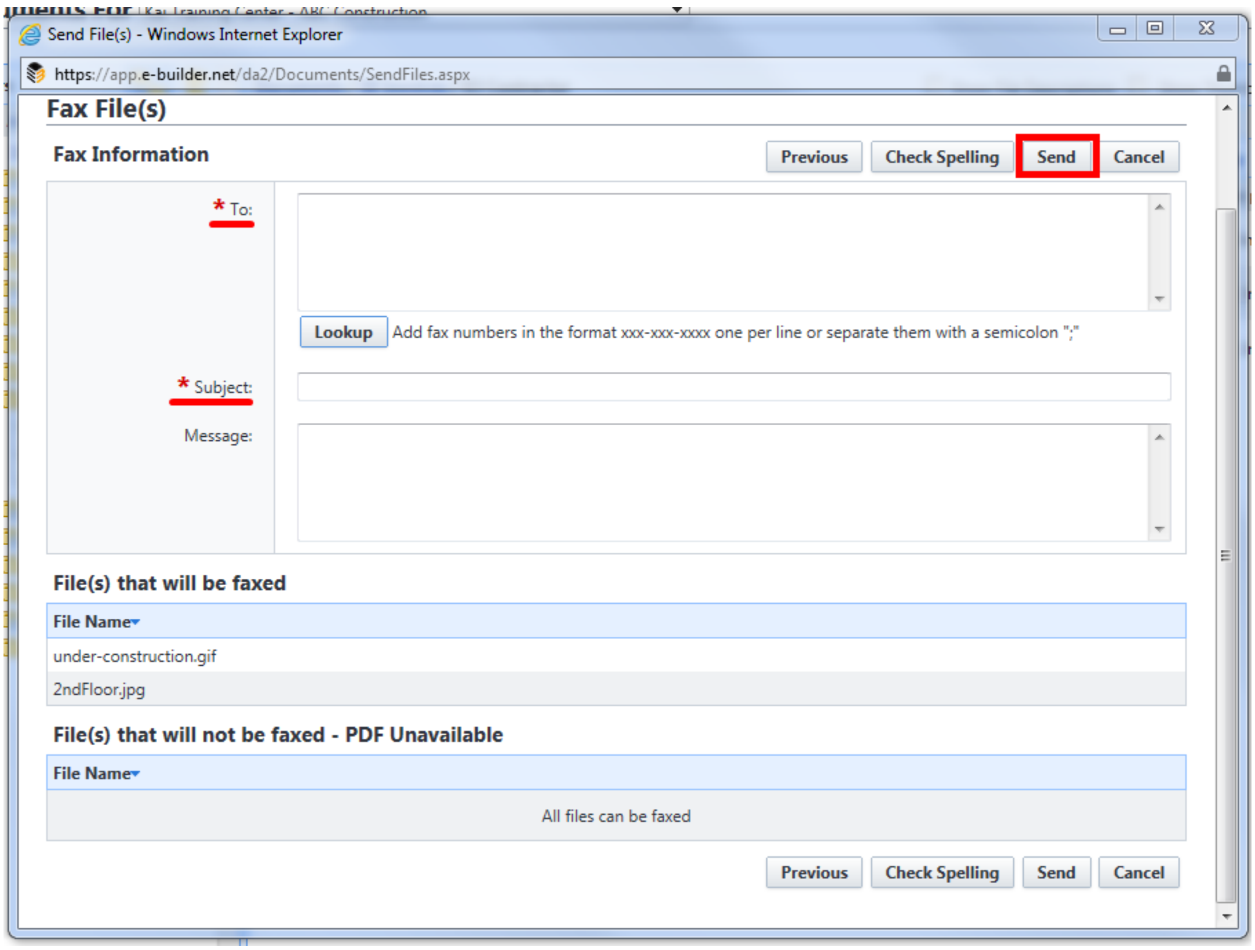
3. *Select the method in which the file(s) are to be sent and click **Next**.*



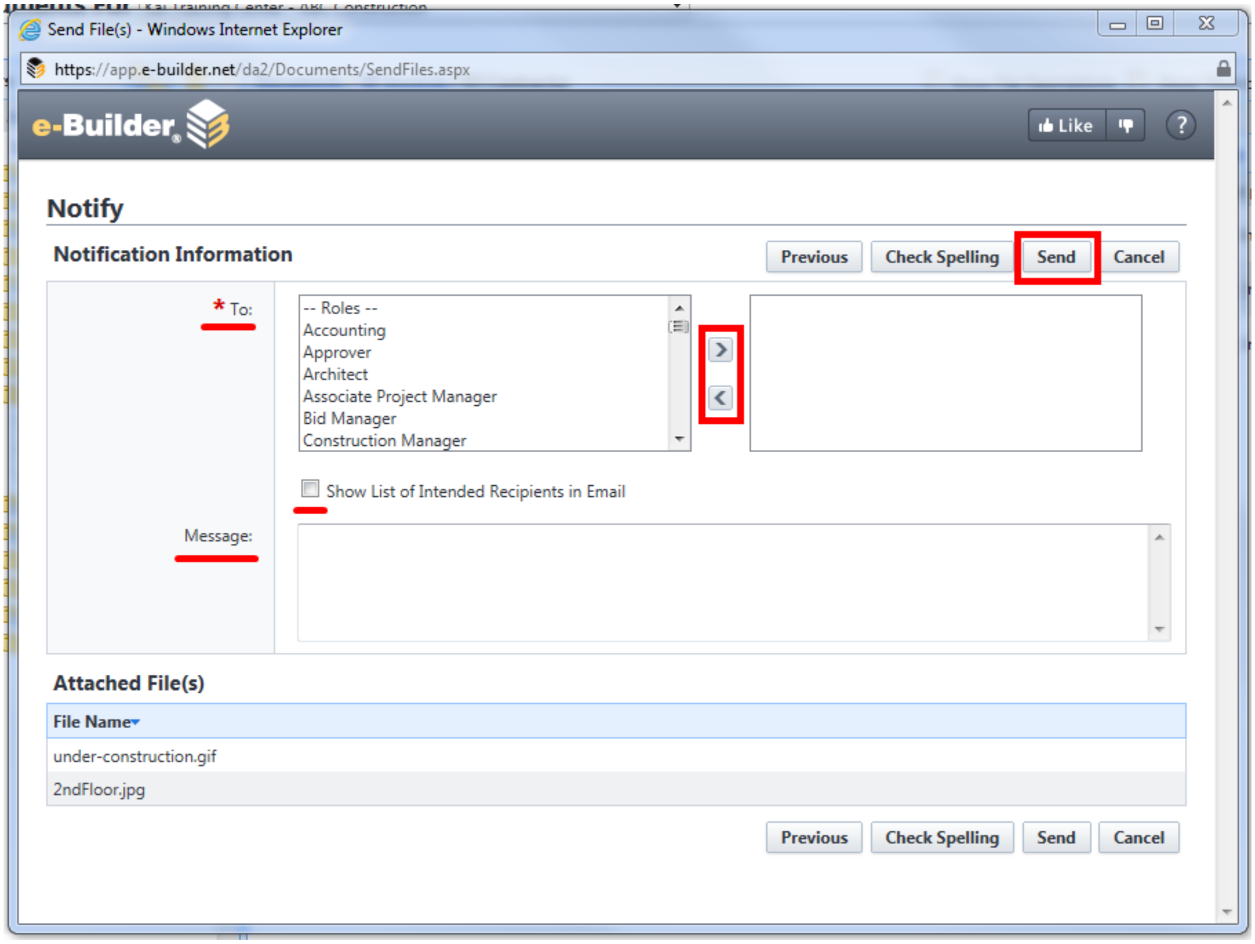
4. *For Email:*
    - *choose from drop down menu to send files as attachments or links to download (this option is useful for sending large amounts of data)*
    - *Insert emails in the "To" box by manually typing them or using the "lookup" function*
    - *Add a subject and description (description is optional)*
    - *Choose to send native file or pdf (pdf's do not allow for editing, only viewing)*
    - *Click **Send***



5. *For Fax:*
   - *Insert fax numbers manually or use "lookup" function*
   - *Add a subject and optional message*
   - *Click **Send***



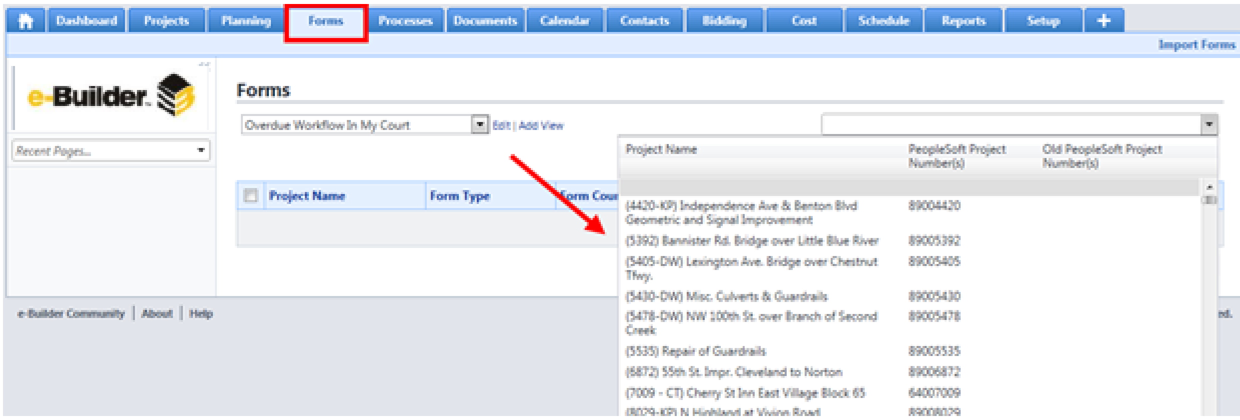
6. *For Notify: (Used to send documents to users within e-Builder)*
    - *Select users from list box on left and use arrows to move between boxes. (Right box represents users that will receive files)*
    - *Choose to "Show List of Intended Recipients in Email" or add message if desired.*
    - *Click **Send***



Forms Module

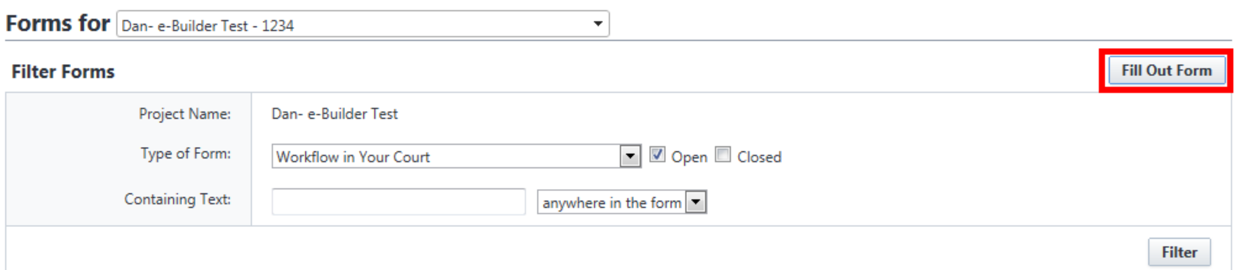
The e-Builder Forms module helps facilitate communication on project teams. A form is a set of data fields that is filled out in order to store information and report on it, or to pass information on to team members for them to take action on. There two form types in e-Builder are Static and Workflow. Static is used for informational purposes only and cannot be routed to other users. Workflow forms are routable forms which typically require action to be taken by another user.

1. *To access Forms, Click on the **Forms** tab. Select the project by using the Go to Forms drop down menu.*

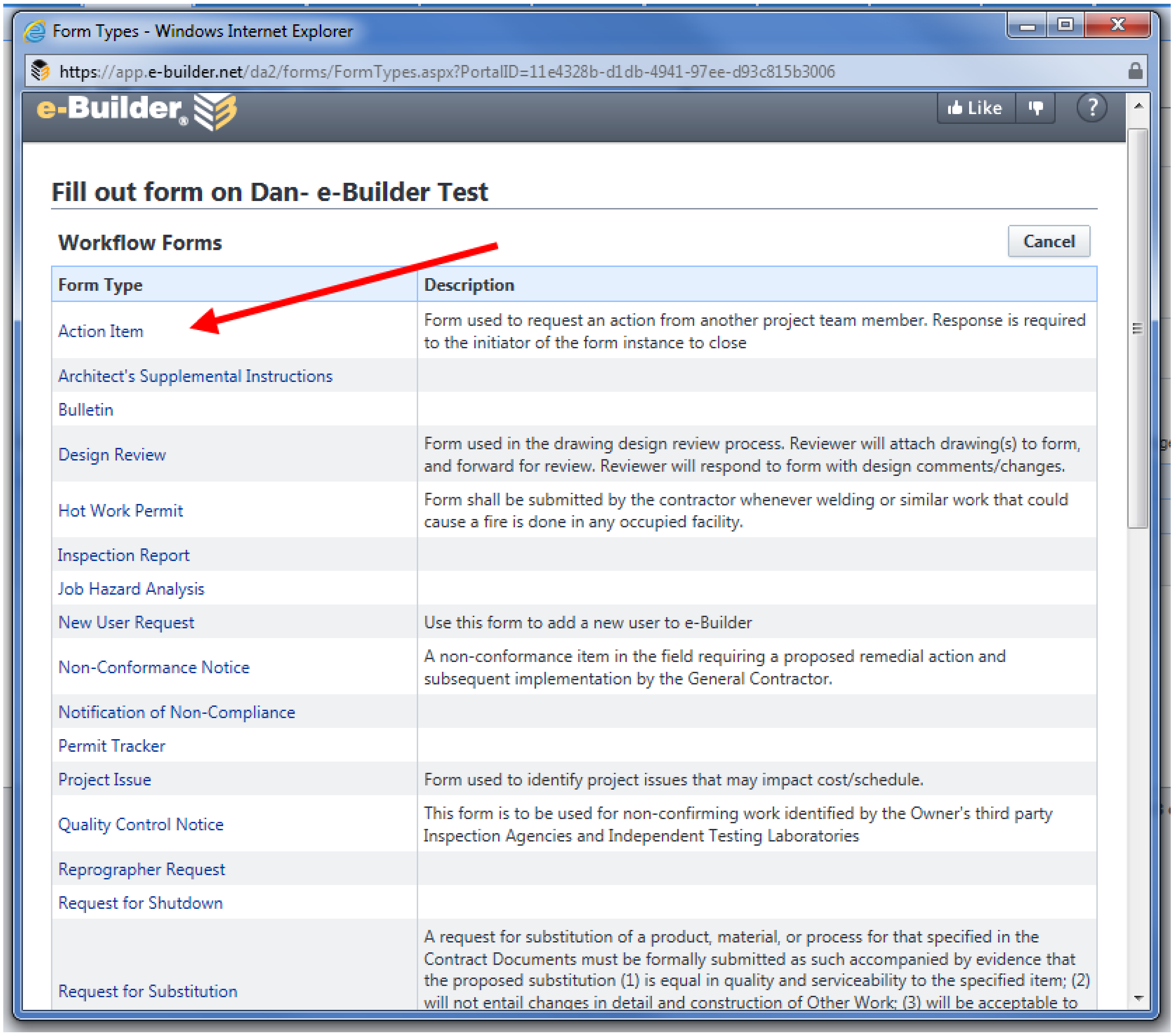


Initiating a Form

2. *Go to the **Forms** tab.*
3. *Select the project you need to fill out the form for by clicking the Go To Forms and use the drop-down box*
4. *Click the **Fill Out Form** button.*



5. *Select the type of form you wish to create. Workflow Forms appear at top and static forms will appear below (User may need to scroll down to view static forms)*



Form Types - Windows Internet Explorer

https://app.e-builder.net/da2/forms/FormTypes.aspx?PortalID=11e4328b-d1db-4941-97ee-d93c815b3006

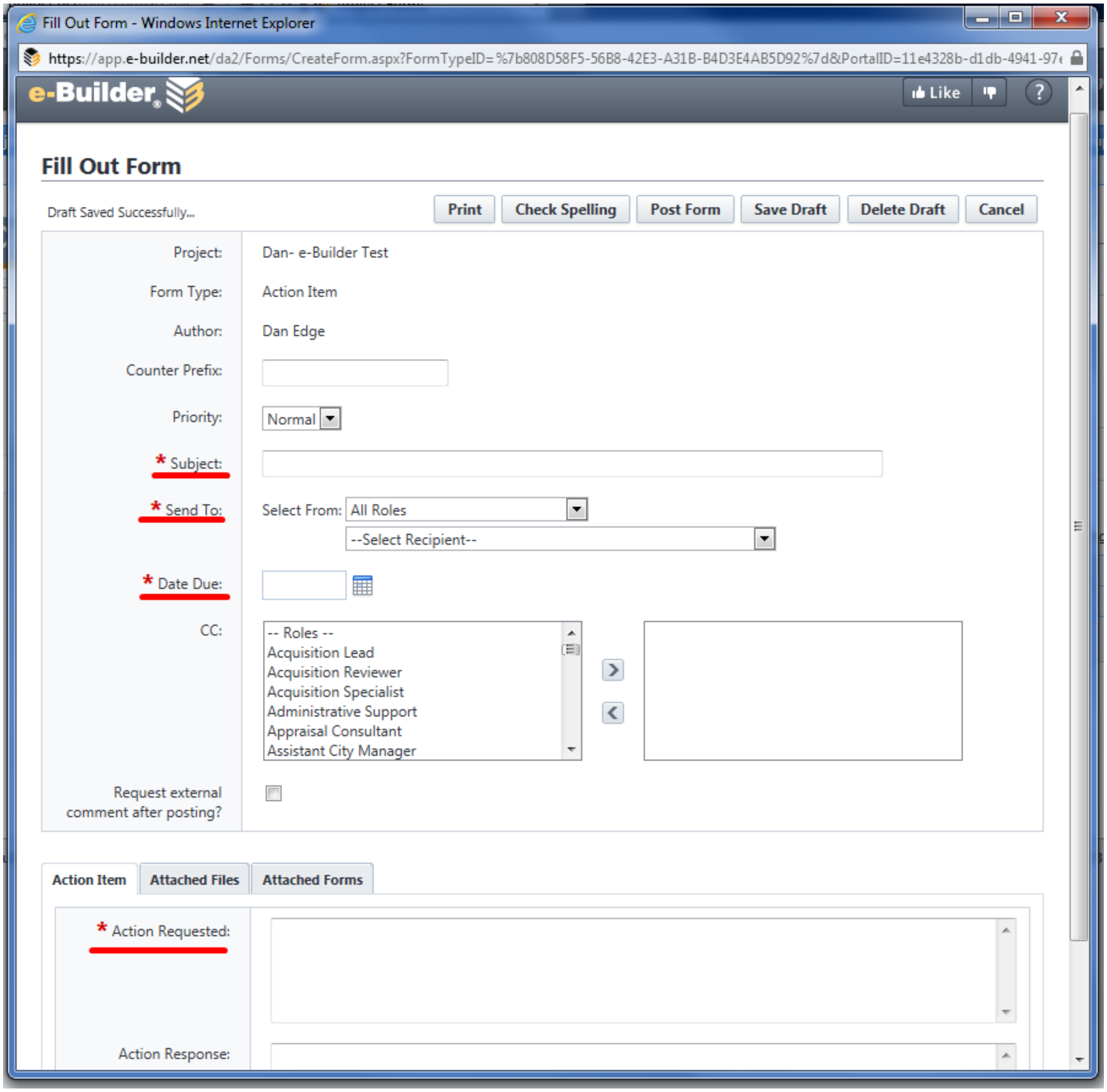
Fill out form on Dan- e-Builder Test

Workflow Forms

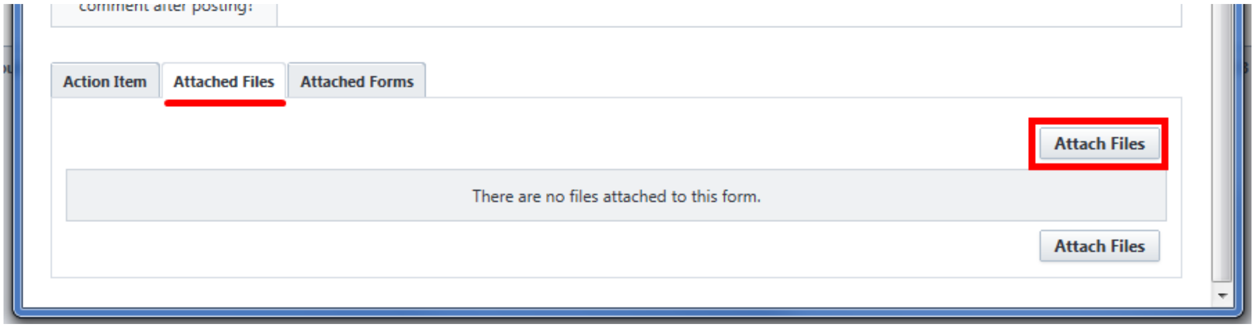
Cancel

Form Type	Description
Action Item	Form used to request an action from another project team member. Response is required to the initiator of the form instance to close
Architect's Supplemental Instructions	
Bulletin	
Design Review	Form used in the drawing design review process. Reviewer will attach drawing(s) to form, and forward for review. Reviewer will respond to form with design comments/changes.
Hot Work Permit	Form shall be submitted by the contractor whenever welding or similar work that could cause a fire is done in any occupied facility.
Inspection Report	
Job Hazard Analysis	
New User Request	Use this form to add a new user to e-Builder
Non-Conformance Notice	A non-conformance item in the field requiring a proposed remedial action and subsequent implementation by the General Contractor.
Notification of Non-Compliance	
Permit Tracker	
Project Issue	Form used to identify project issues that may impact cost/schedule.
Quality Control Notice	This form is to be used for non-confirming work identified by the Owner's third party Inspection Agencies and Independent Testing Laboratories
Reprographer Request	
Request for Shutdown	
Request for Substitution	A request for substitution of a product, material, or process for that specified in the Contract Documents must be formally submitted as such accompanied by evidence that the proposed substitution (1) is equal in quality and serviceability to the specified item; (2) will not entail changes in detail and construction of Other Work; (3) will be acceptable to

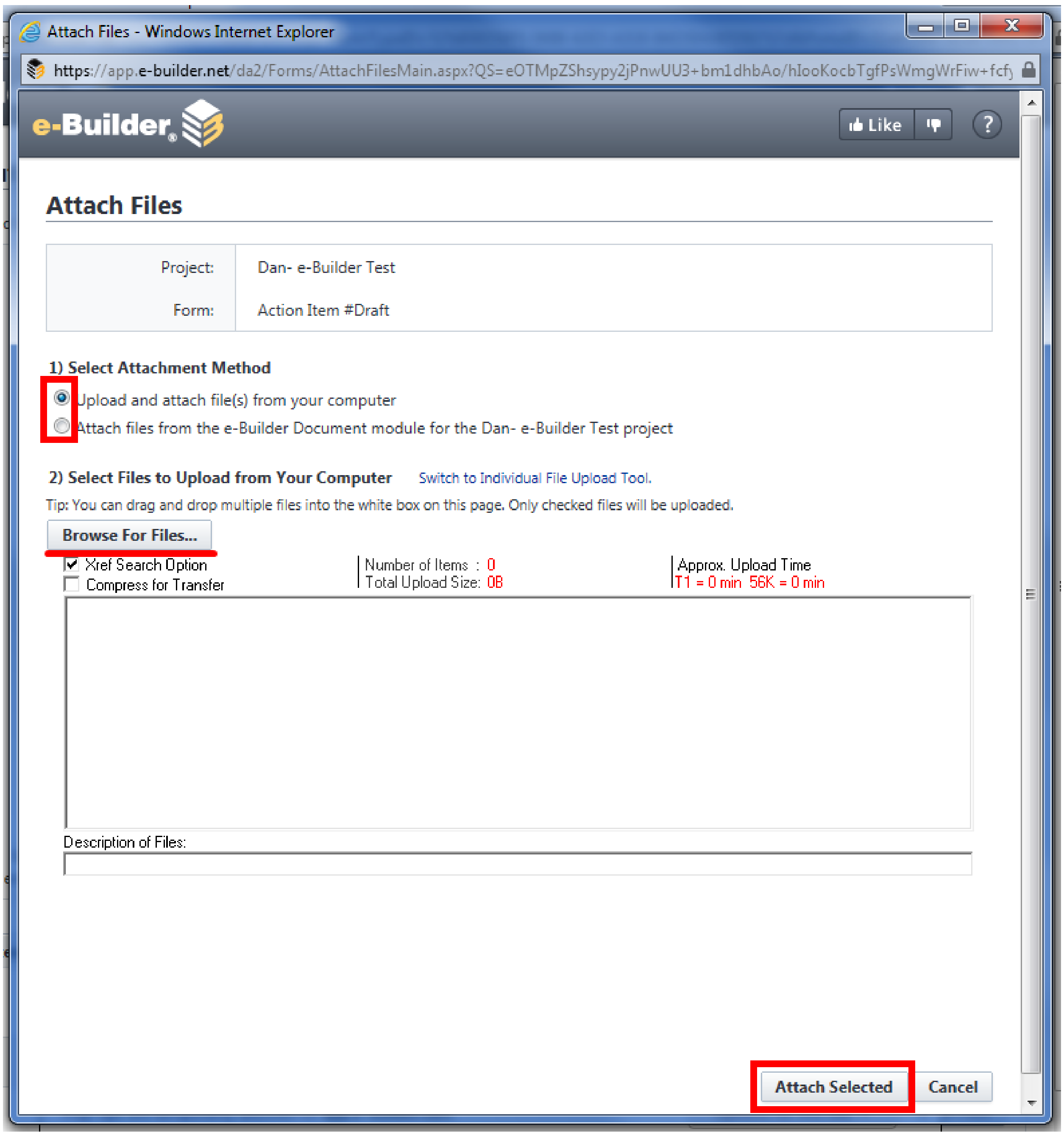
6. *For Workflow Forms:*
    - *Fill out the information in the header of the form*
    - *Enter a Subject line for the form*
    - *Select who should receive the form from the Send To drop-down box*
    - *Select who should be copied on the form (if anyone) from the CC: box - you may choose to copy everyone in a given role on a project or an individual*
    - *Select a due date.*
    - *If necessary, you may change the priority of the form. The default priority is Normal.*
    - *Fill out the form's data fields, the required fields are noted in red*



7. *Attach back up documentation if needed by clicking Attached Files tab. An Attach files screen will be displayed. You can attach documents to a form in three ways:*
   - *Method 1: Drag and drop files using the same upload procedure as defined in the Documents module. (See Uploading Documents for help)*
   - *Method 2: Select 'Upload and attach file(s) from your computer ' and click Browse For Files*
   - *Method 3: Select 'Attach files from the e-Builder Document module for the Dan- e-Builder Test project' and click Browse For Files. Choose the Folder and you will see your folder structure for the selected project.*
   - *Click **Attach Selected***

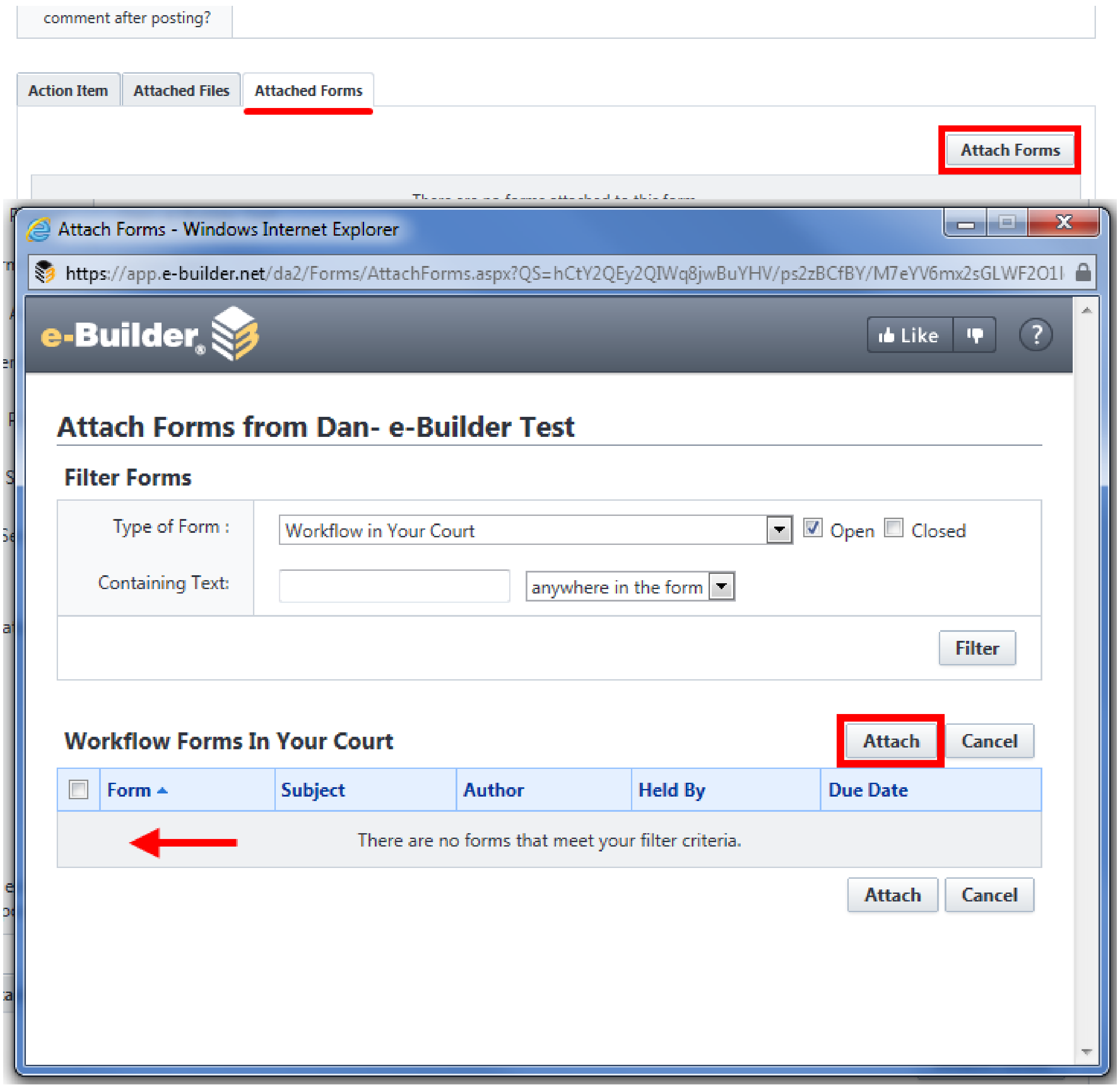


Action Item
Attached Files
Attached Forms
Attach Files
There are no files attached to this form.
Attach Files

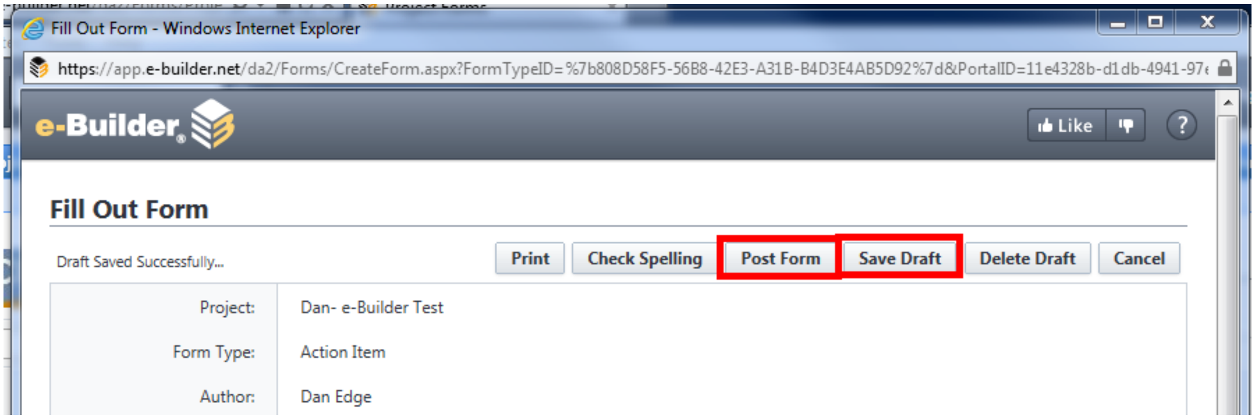


Attach Files - Windows Internet Explorer
https://app.e-builder.net/da2/Forms/AttachFilesMain.aspx?QS=eOTMpZShsypy2jPnwUU3+bm1dhbAo/hIooKocbTgfPsWmgWrFiw+fcfy
Like
Attach Files
Project: Dan- e-Builder Test
Form: Action Item #Draft
1) Select Attachment Method
Upload and attach file(s) from your computer
Attach files from the e-Builder Document module for the Dan- e-Builder Test project
2) Select Files to Upload from Your Computer
Switch to Individual File Upload Tool.
Tip: You can drag and drop multiple files into the white box on this page. Only checked files will be uploaded.
Browse For Files...
Xref Search Option
Compress for Transfer
Number of Items : 0
Total Upload Size: 0B
Approx. Upload Time
T1 = 0 min 56K = 0 min
Description of Files:
Attach Selected
Cancel

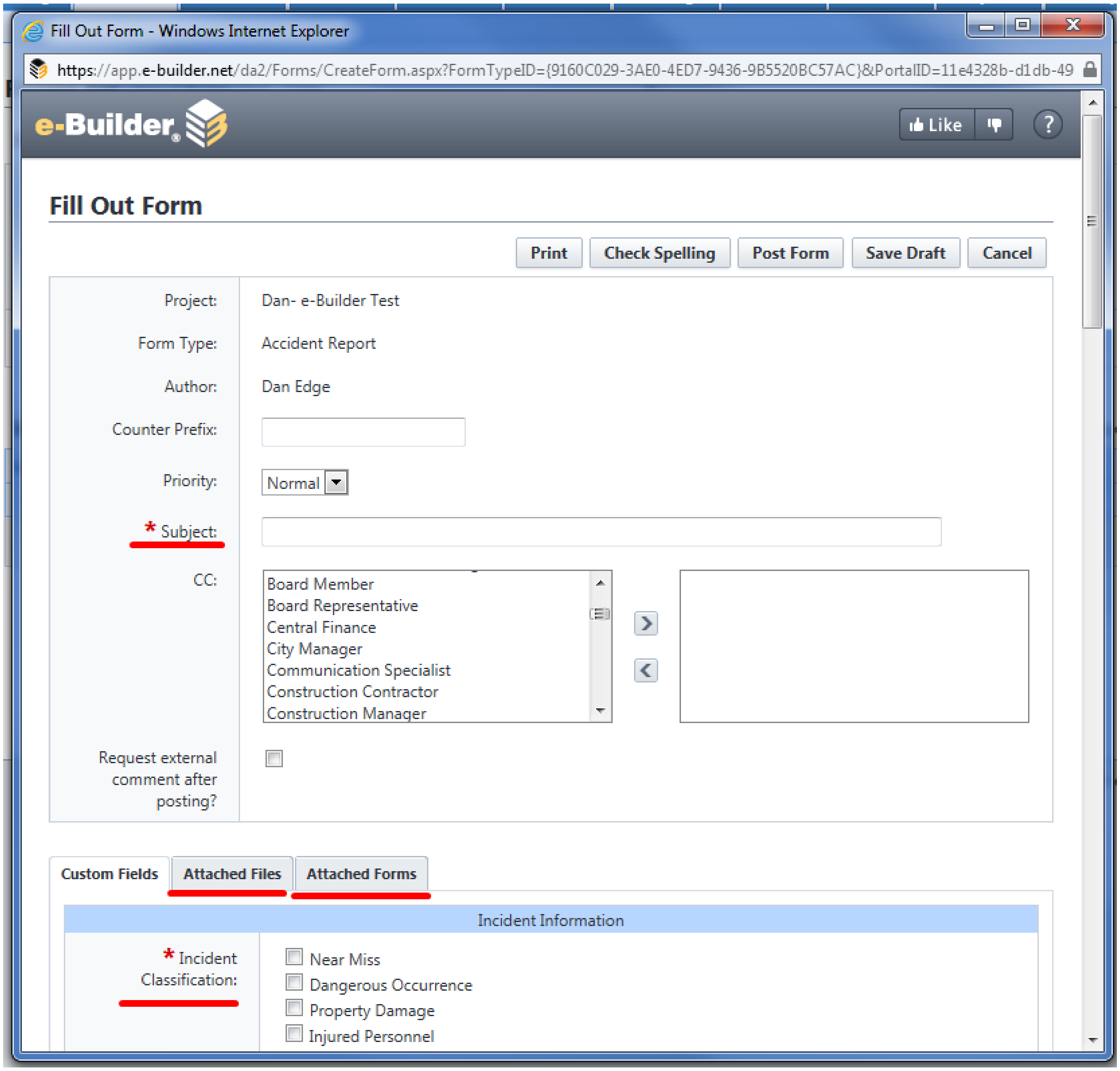
8. *Attach Forms by checking appropriate forms and clicking **Attach** (example below does not have any forms to be checked)*



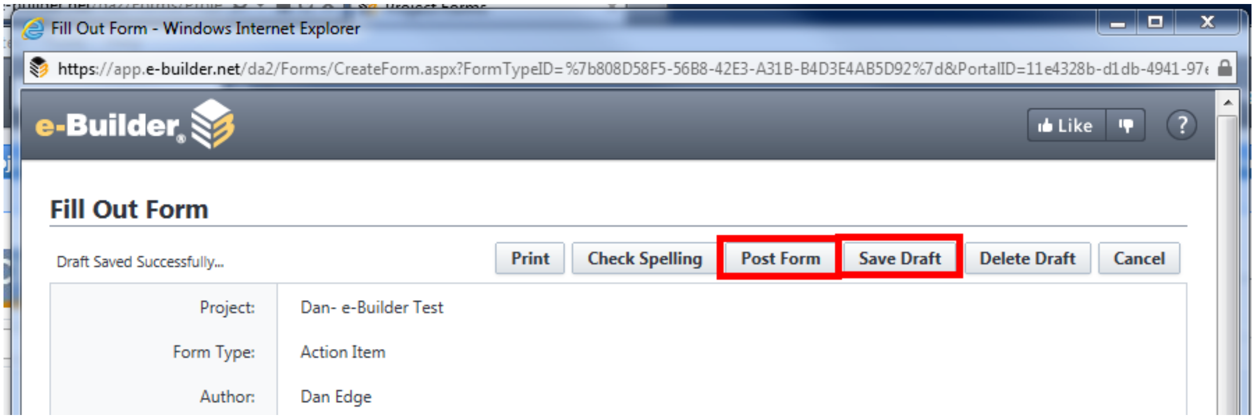
9. *Once complete, click **Post Form**. If you are not ready to post the form, click **Save**.*



10. *For Static Forms:*
    - *Fill out the information in the header of the form*
    - *Enter a Subject line for the form*
    - *Select who should be copied on the form (if anyone) from the CC: box - you may choose to copy everyone in a given role on a project or an individual*
    - *If necessary, you may change the priority of the form. The default priority is Normal.*
    - *Fill out the form's data fields, the required fields are noted in red*



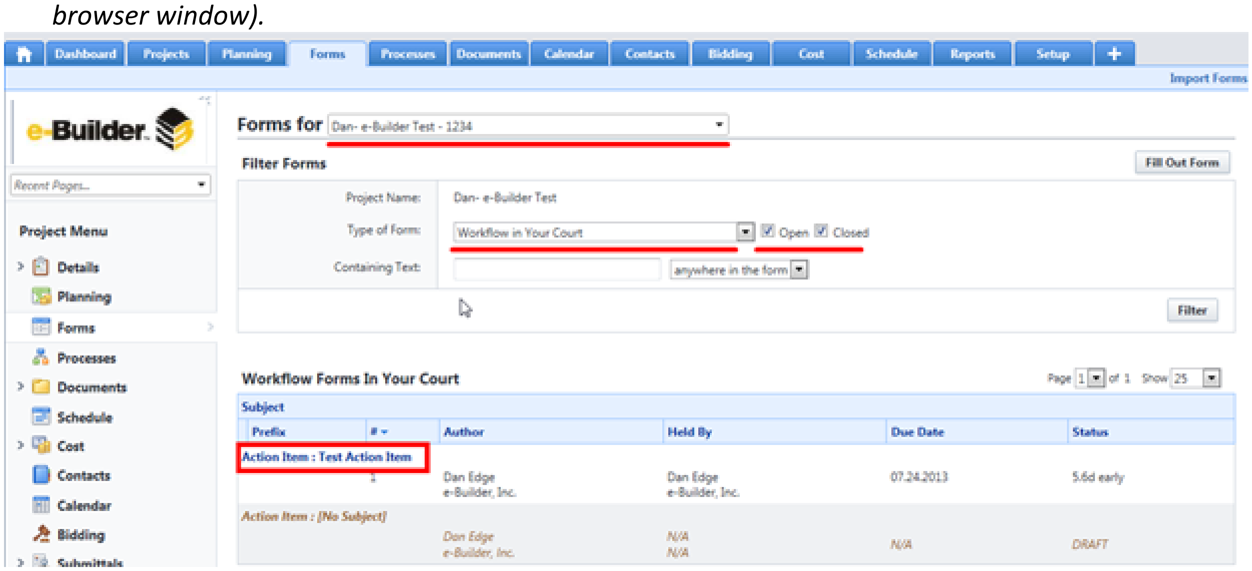
11. *Attach back up documentation if needed. (Process is identical to attaching files to Workflow form above)*
12. *Attach Forms if needed. (Process is identical to attaching forms to Workflow form above)*
13. *Once complete, click* ***Post Form****. If you are not ready to post the form, click* ***Save****.*



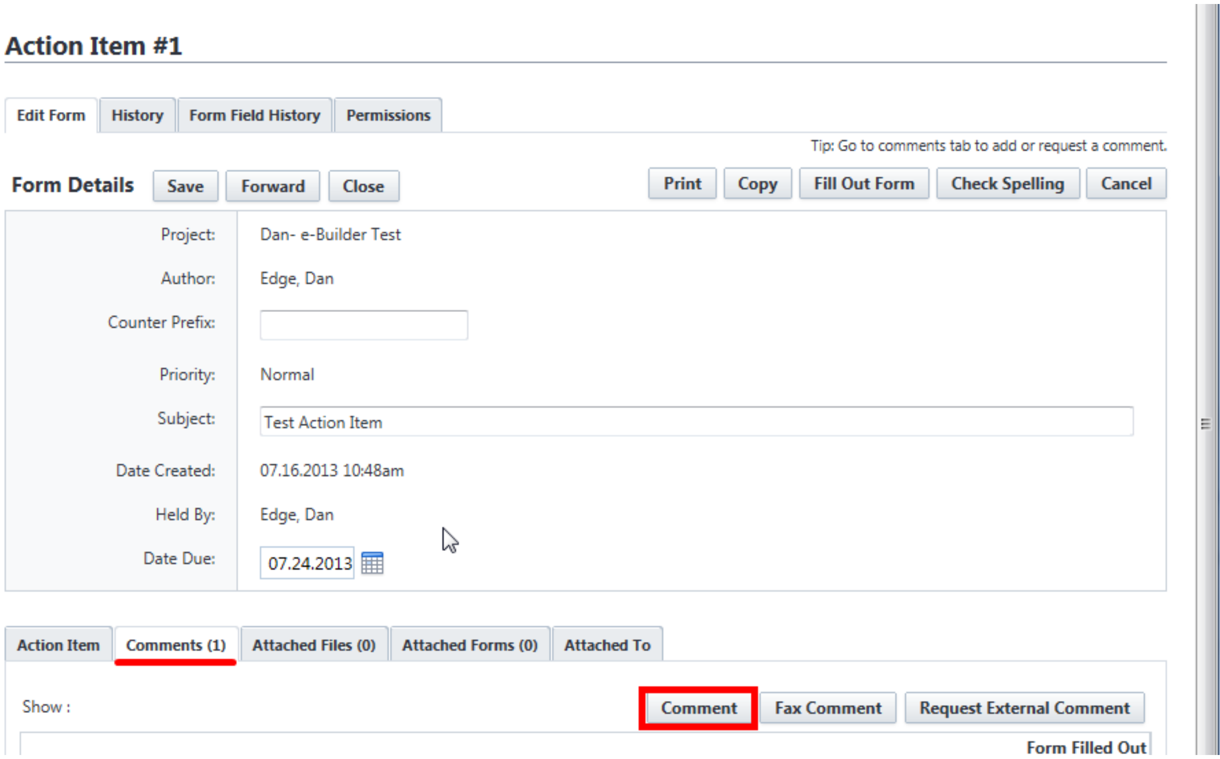
Commenting on a Form

e-Builder allows you to add a comment to a form. You can add a comment to a form at any time you wish, as long as the form is open; the form need not be in your court. The default form view when you access a form from the Forms tab is the Workflow Forms In Your Court view.

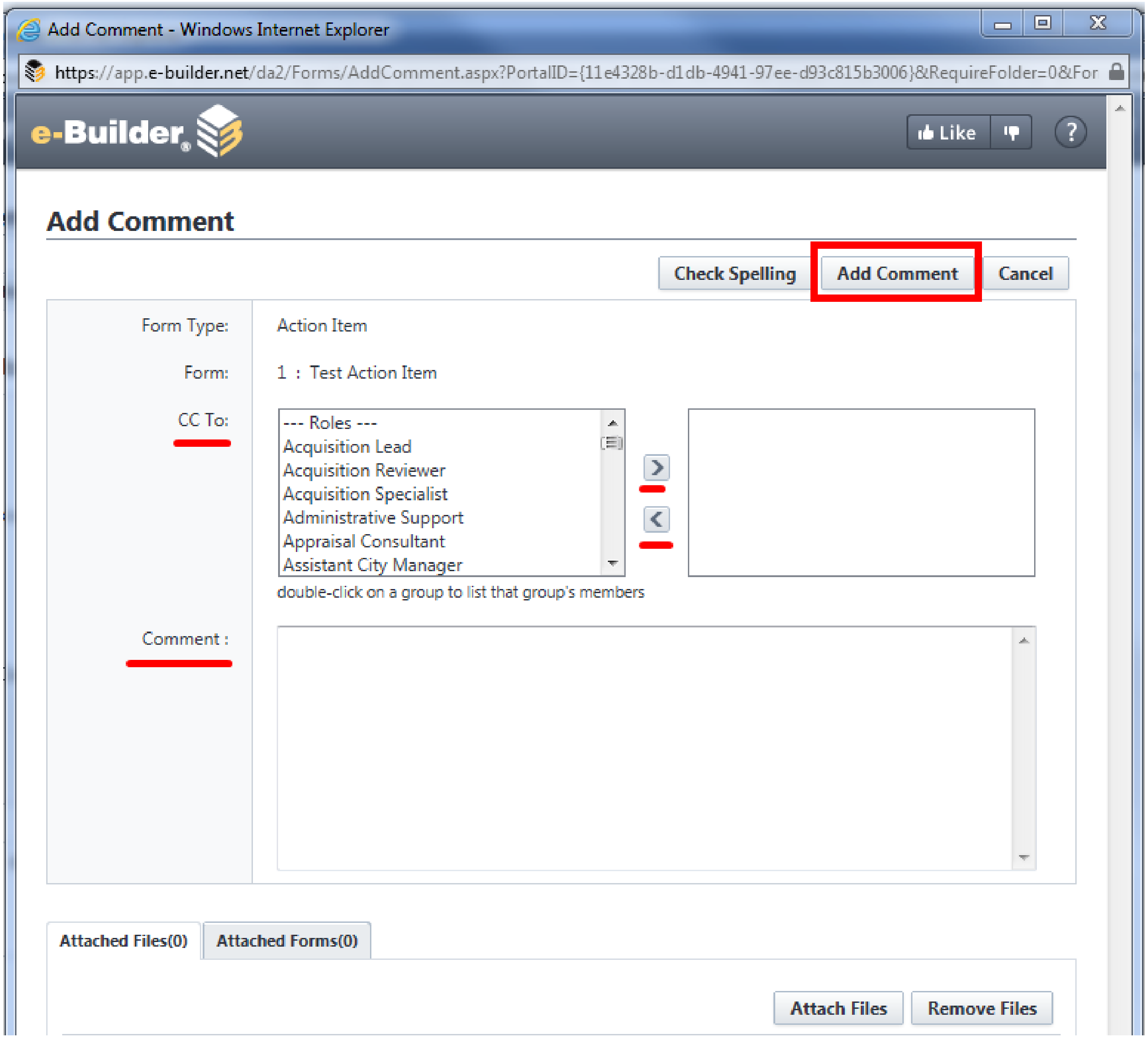
1. *Select the form on which you wish to comment. The form will open to the form detail (in a new browser window).*



2. *Click the* ***Comment*** *button. When you comment, the participants on this form will automatically receive an e-mail notification of your comment. You can also CC any additional participants on the project for this form at the same time. You must select the role(s), group(s), and user(s) and click the right arrow button to add them. Or, you can select them and click the left arrow button to remove them if you added them by mistake.*



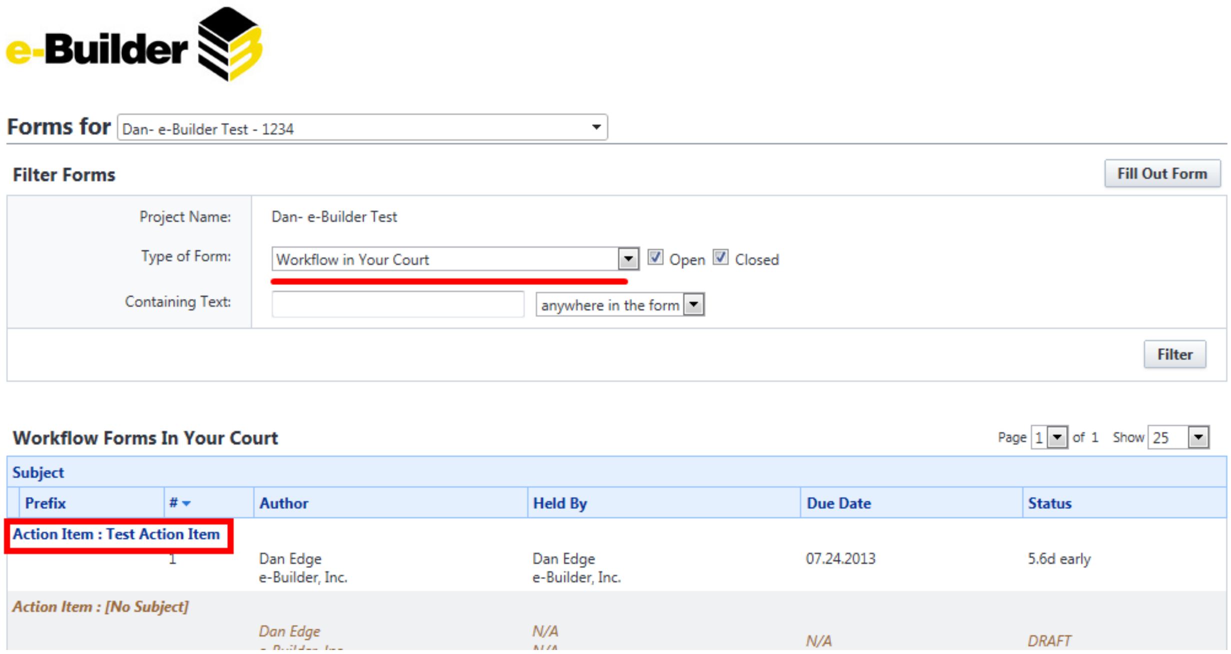
3. *Before you complete your comment, you can attach files and/or forms as supporting information, if desired.*
4. *When you are done, click the **Add Comment** button.*



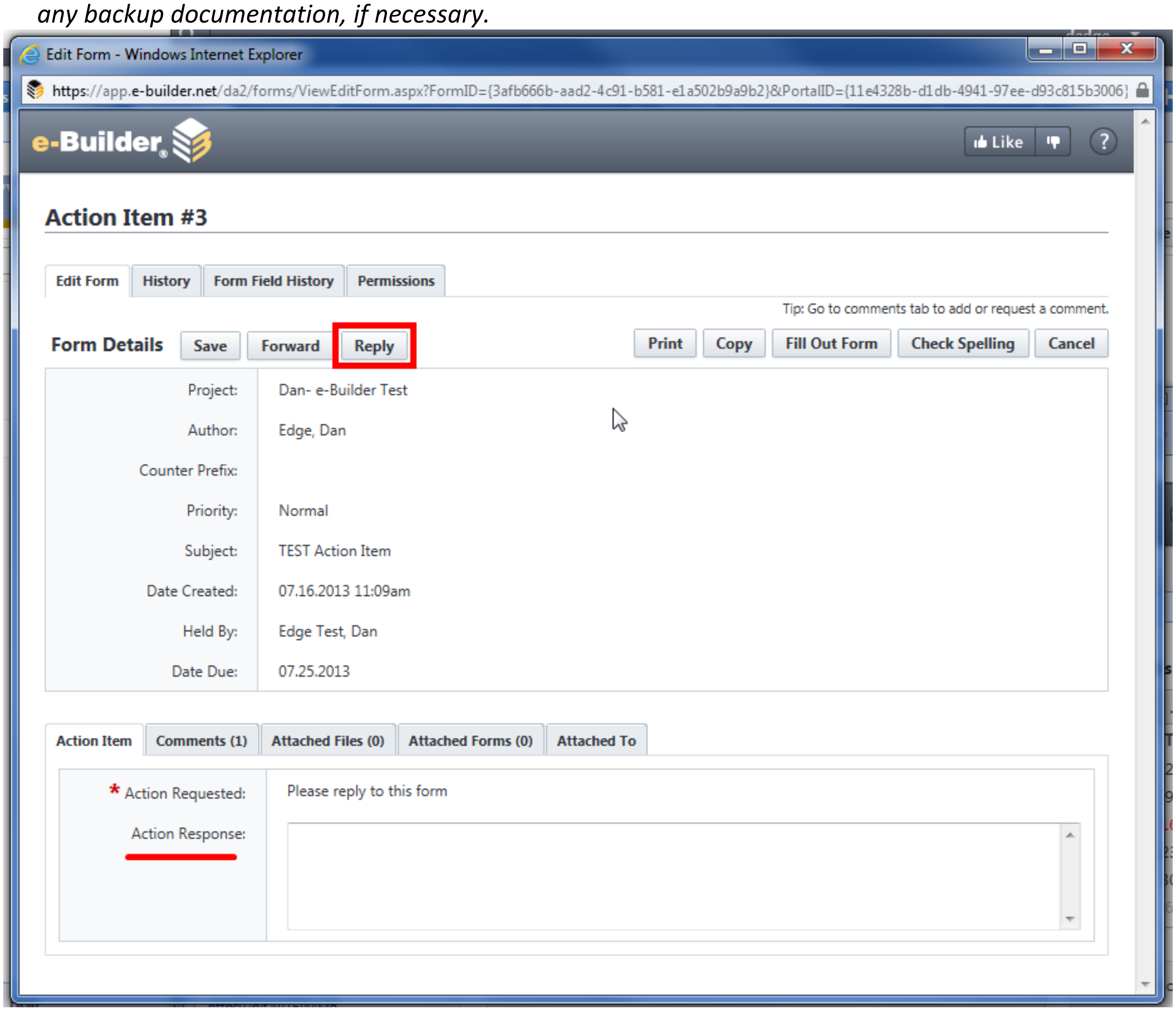
Replying to a Workflow Form

When a workflow form is placed in your court, you will receive a notification e-mail from the e-Builder system. The recipient(s), upon receipt of their e-mails can click on the link which will bring them directly to the form instance. The user will also see a list of Workflows in their court when they log into their site.

1. *Go to the **Forms** tab.*
2. *Select the Workflow in My Court view from the drop-down list in the middle of the screen.*
3. *Click the Subject of the form. It will now open in a new window.*



4. *Click **Reply**. In the dialog that appears, enter any additional comments you wish to make and attach any backup documentation, if necessary.*

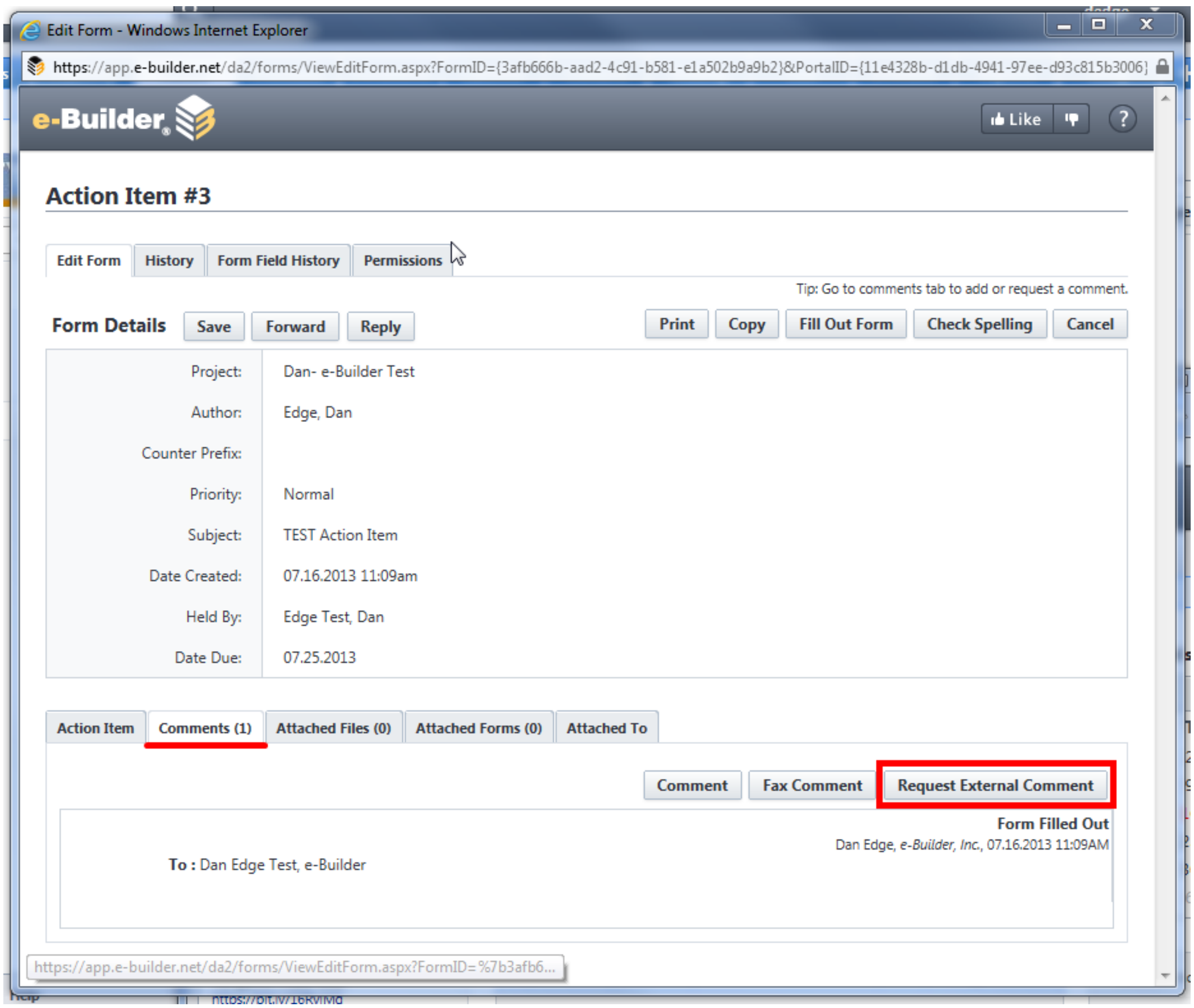


5. *Click **Reply**.*

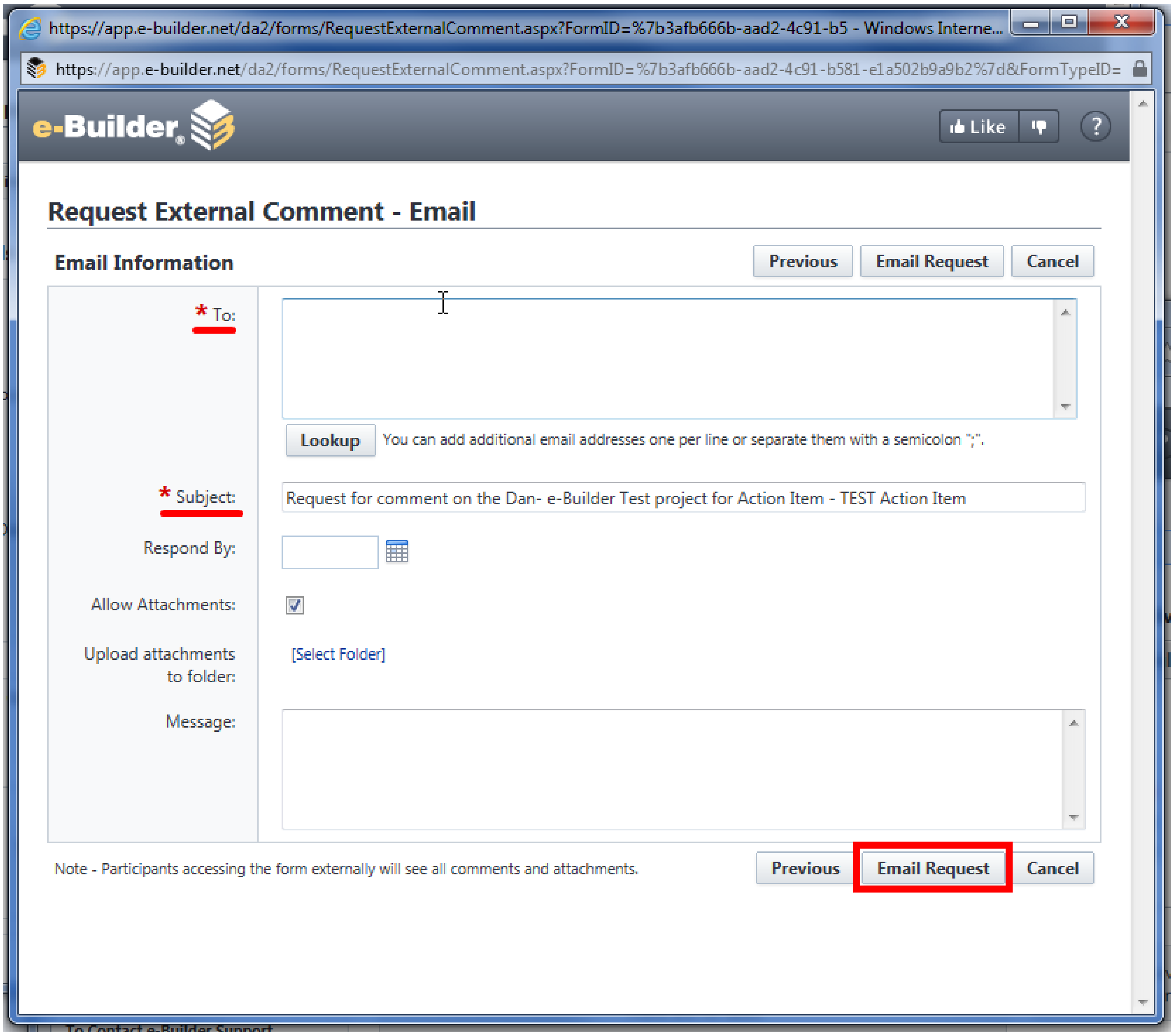
Requesting External Comment

e-Builder allows you to send an e-mail "Request for external comment", the comment would be made externally into e-Builder. The user does not need an e-Builder license to comment.

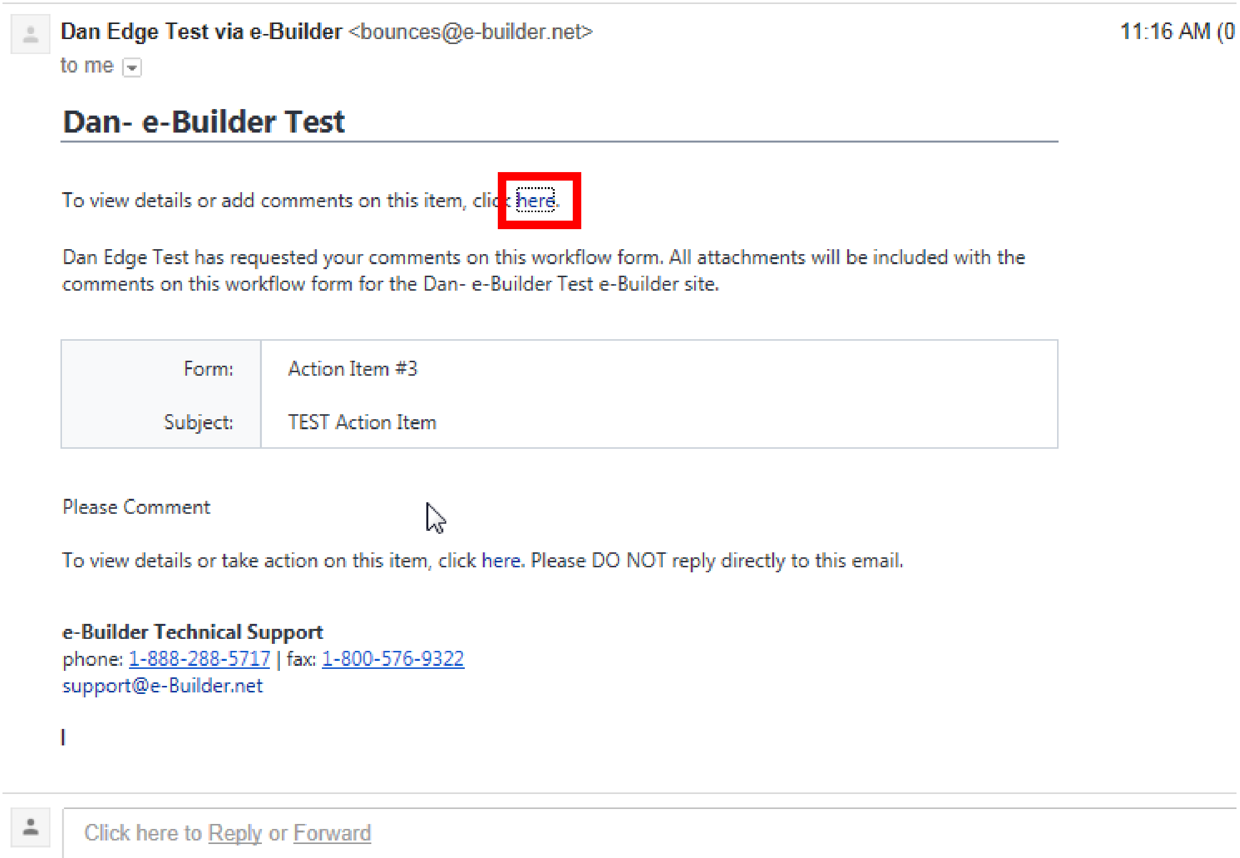
1. *Select the form. The form will open in a new browser window to the detail of the form.*
2. *Click the **Comments** tab, then **Request External Comment** button.*



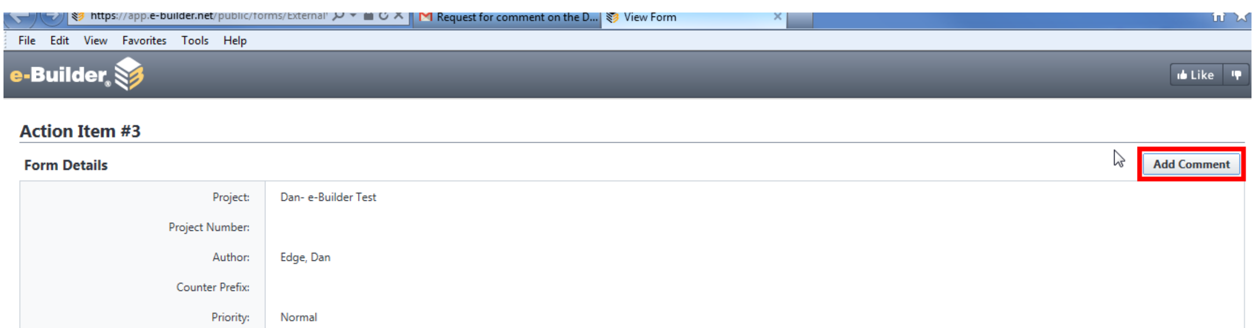
3. *Select the method of delivery either email or fax, click **Next**.*
4. *Enter the recipient e-mail address, a subject line and a date for response. Use the **lookup** link to locate contact information.*
5. *Click **Email Request.***



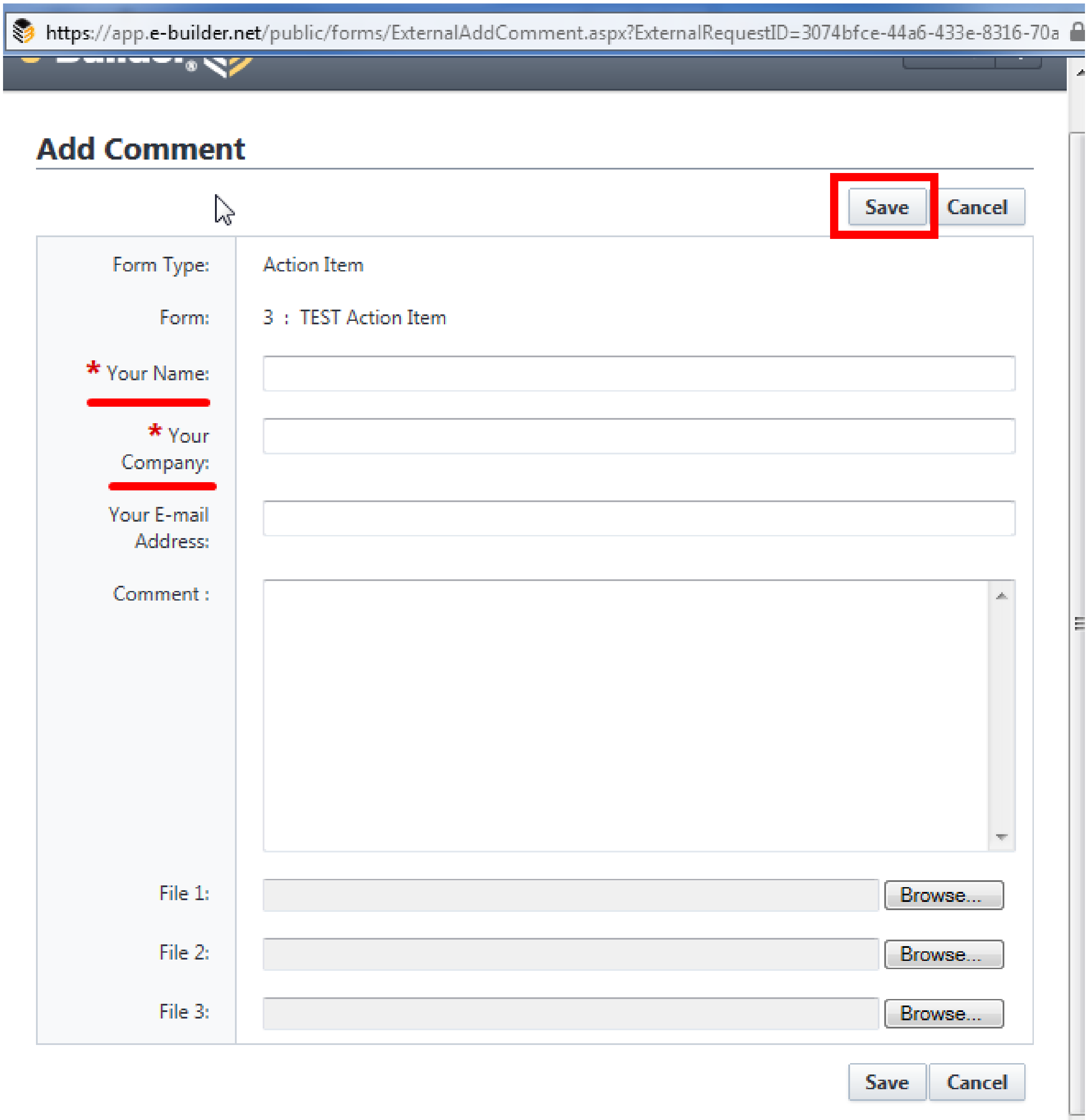
6. *The recipient will receive an e-mail that contains the name of the form and a link to click on for further information. When they click on the link they are taken to a copy of the form. The recipient clicks the **Add Comment** button.*



Dan Edge Test via e-Builder <bounces@e-builder.net>
11:16 AM (0
to me
Dan- e-Builder Test
To view details or add comments on this item, click here.
Dan Edge Test has requested your comments on this workflow form. All attachments will be included with the comments on this workflow form for the Dan- e-Builder Test e-Builder site.
Form: Action Item #3
Subject: TEST Action Item
Please Comment
To view details or take action on this item, click here. Please DO NOT reply directly to this email.
e-Builder Technical Support
phone: 1-888-288-5717 | fax: 1-800-576-9322
support@e-Builder.net
Click here to Reply or Forward



Request for comment on the D...
View Form
File Edit View Favorites Tools Help
e-Builder
Like
Action Item #3
Form Details
Add Comment
Project: Dan- e-Builder Test
Project Number:
Author: Edge, Dan
Counter Prefix:
Priority: Normal



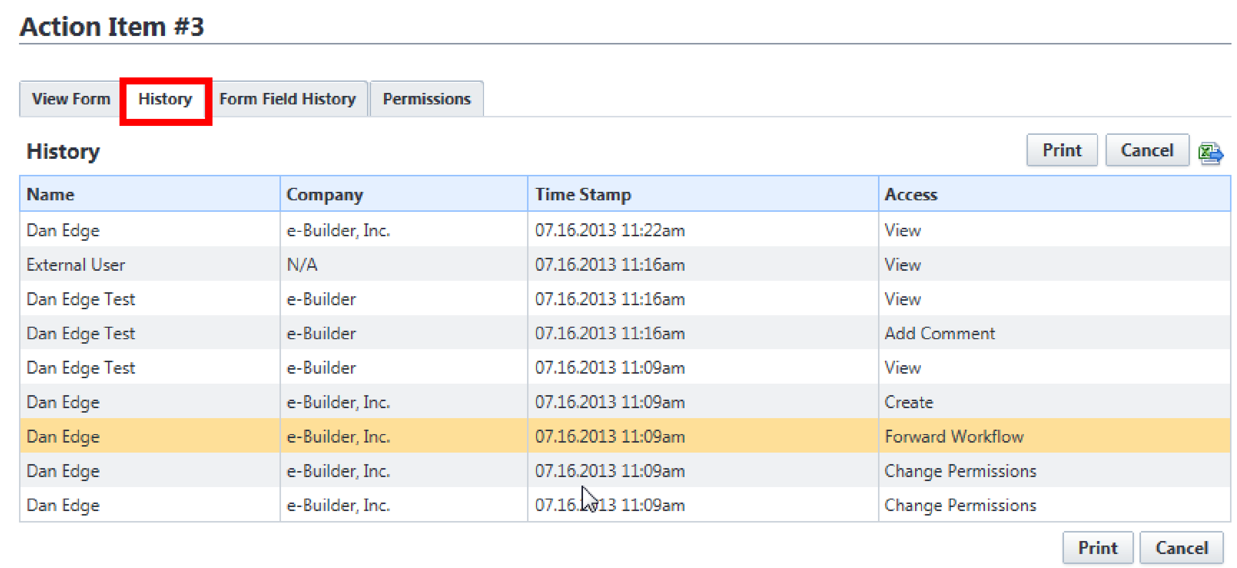
7. *Upon clicking the **Save** button, the response and documents are added to the Comments section of the Form. If the e-mail response requested was sent to multiple e-mail addresses each response by each recipient will be stored as a separate comment in the form instance.*

Tracking History

The Forms module provides you audit capability for all items sent and received, including actions sent and documents attached, dates, and times. This is ideal for compliance and record-keeping purposes.

1. *From the Filter Forms screen, select the desired form by clicking on it. (Use the filter to view certain/all forms)*

2. *From this screen there are three tabs that provide a wealth of history-related information:*
3. ***History** - Displays Name (initiator), Company, Time Stamp, and the nature of the Access. (e.g., view, change, etc.)*



Action Item #3

View Form | History | Form Field History | Permissions

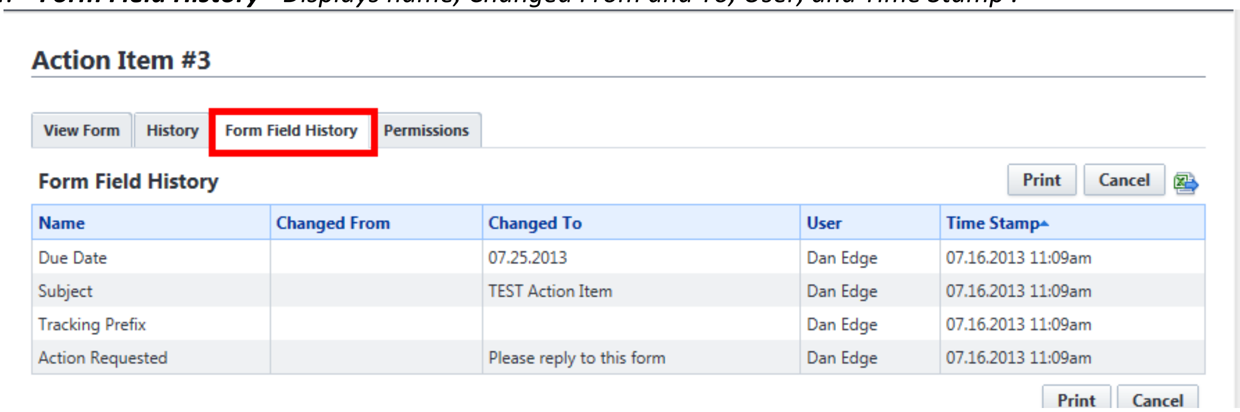
History

Print | Cancel

Name	Company	Time Stamp	Access
Dan Edge	e-Builder, Inc.	07.16.2013 11:22am	View
External User	N/A	07.16.2013 11:16am	View
Dan Edge Test	e-Builder	07.16.2013 11:16am	View
Dan Edge Test	e-Builder	07.16.2013 11:16am	Add Comment
Dan Edge Test	e-Builder	07.16.2013 11:09am	View
Dan Edge	e-Builder, Inc.	07.16.2013 11:09am	Create
Dan Edge	e-Builder, Inc.	07.16.2013 11:09am	Forward Workflow
Dan Edge	e-Builder, Inc.	07.16.2013 11:09am	Change Permissions
Dan Edge	e-Builder, Inc.	07.16.2013 11:09am	Change Permissions

Print | Cancel

4. ***Form Field History** - Displays name, Changed From and To, User, and Time Stamp .*



Action Item #3

View Form | History | Form Field History | Permissions

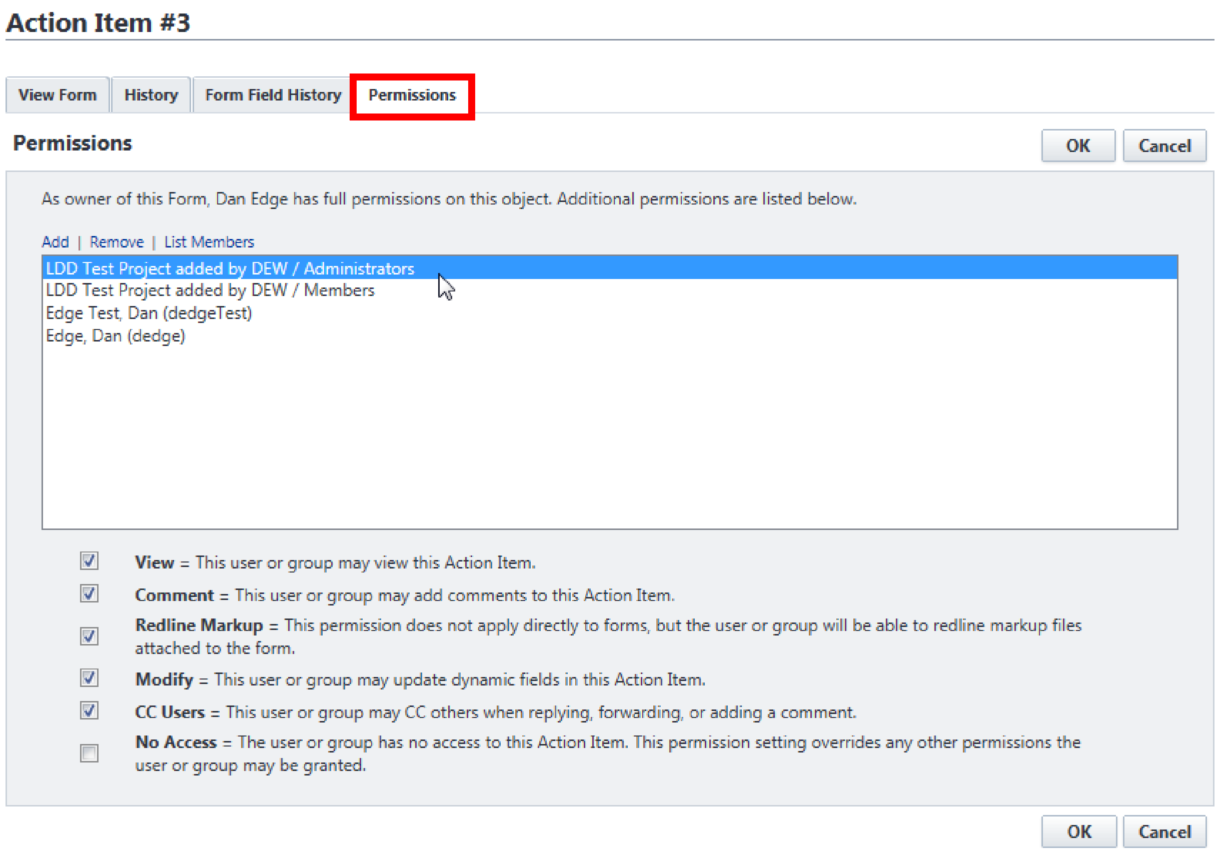
Form Field History

Print | Cancel

Name	Changed From	Changed To	User	Time Stamp
Due Date		07.25.2013	Dan Edge	07.16.2013 11:09am
Subject		TEST Action Item	Dan Edge	07.16.2013 11:09am
Tracking Prefix			Dan Edge	07.16.2013 11:09am
Action Requested		Please reply to this form	Dan Edge	07.16.2013 11:09am

Print | Cancel

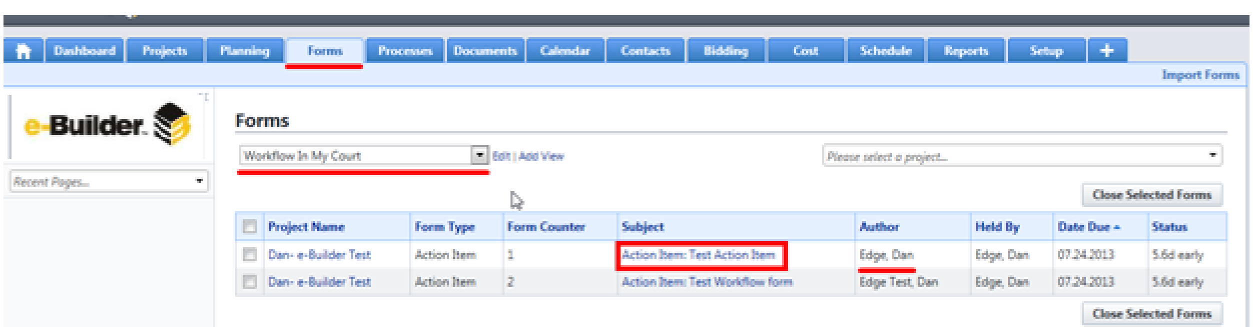
5. ***Permissions** - Displays the names of the Users who have permission on this form, and their specific user and group permissions .*



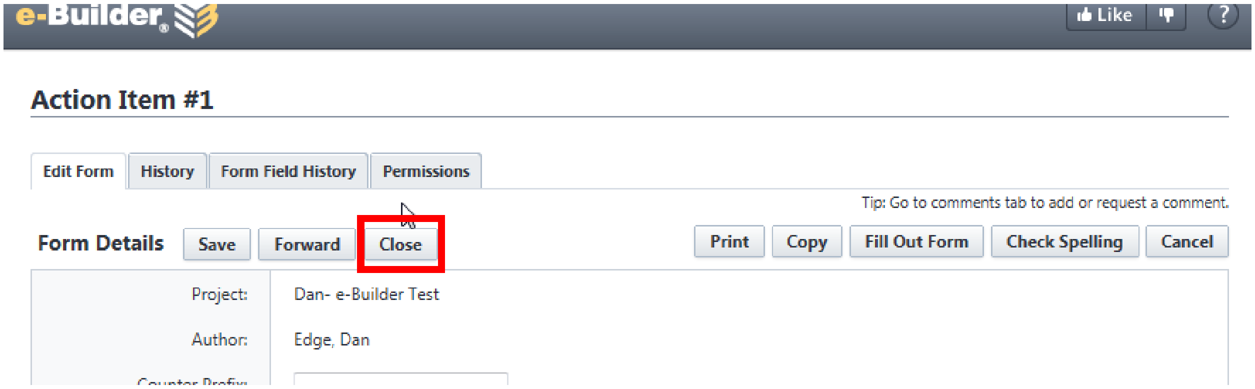
Closing a Form

Workflow forms must be closed when they have been answered or resolved. To close a form, the form must be back in the court of the initiator of the form.

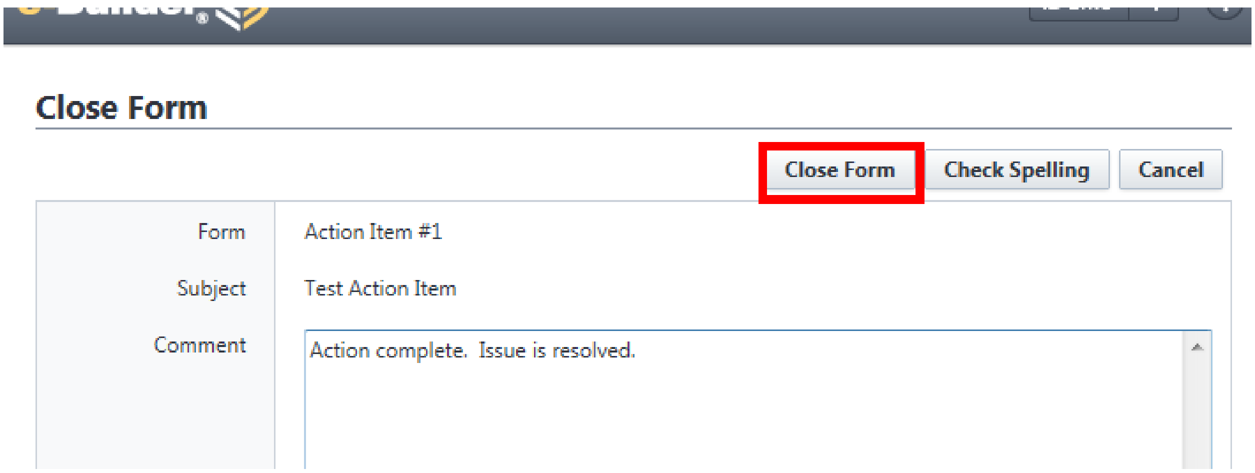
1. *Go to the **Forms** tab for your project and filter for the form in question.*



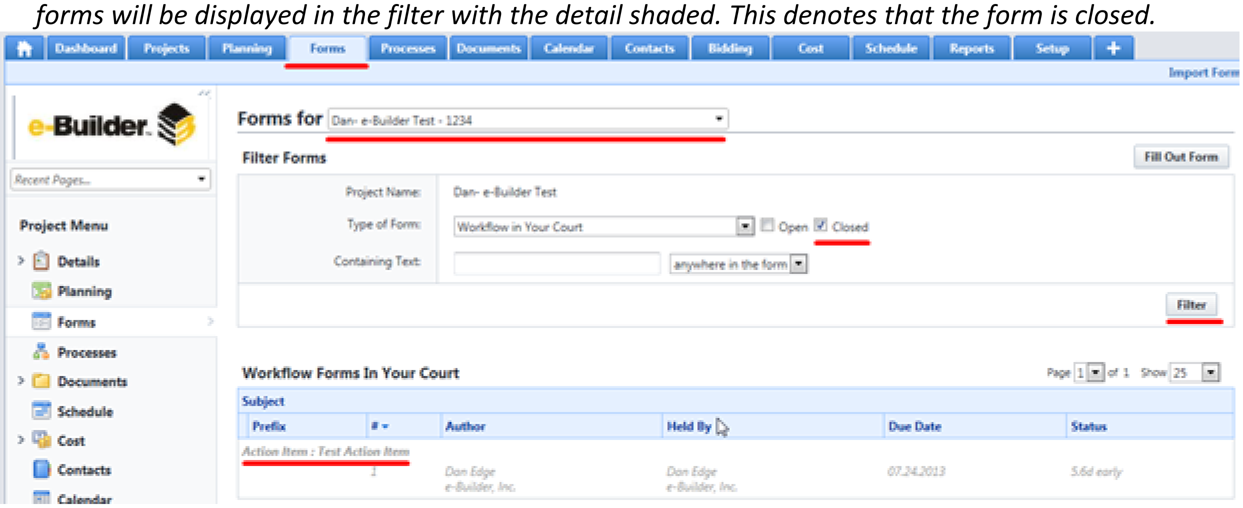
2. *Select the form instance to view the form details. The form will open in a new browser window where you can view the main form detail header information. To ensure you can close the form, the Author and Held By fields must both be your name.*
3. *Review the form and tabs for response information to ensure the form was answered correctly.*
4. *If the response is complete, you must now close the form. Click the **Close** button.*



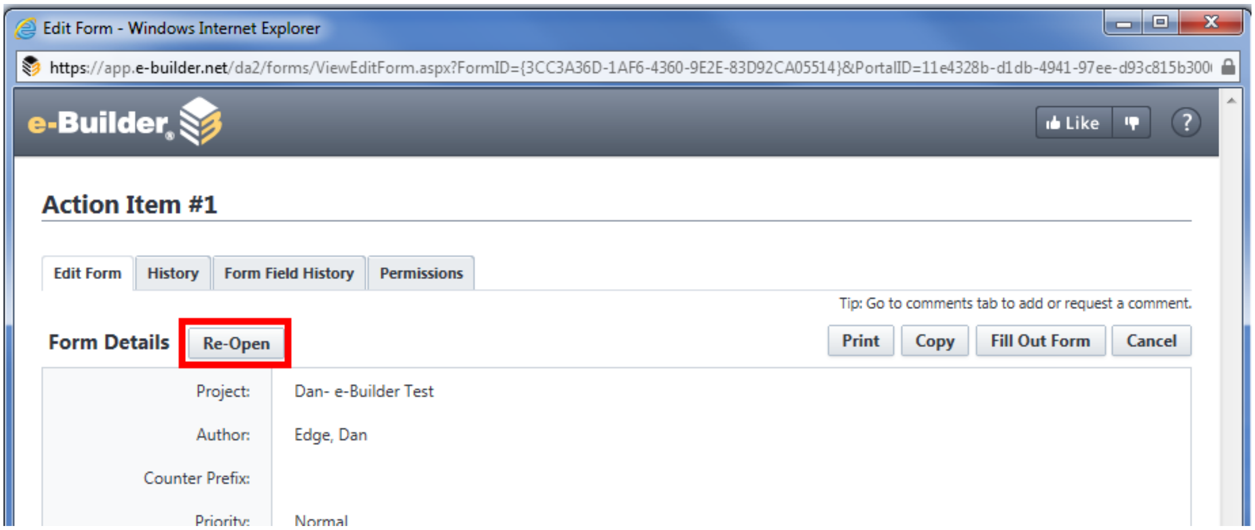
5. *You are now prompted to enter a last comment on the form prior to it being closed. Typically, the comment will include whether the form question has been accepted. When the comment is complete, click the* ***Close Form*** *button. The form is now closed.*



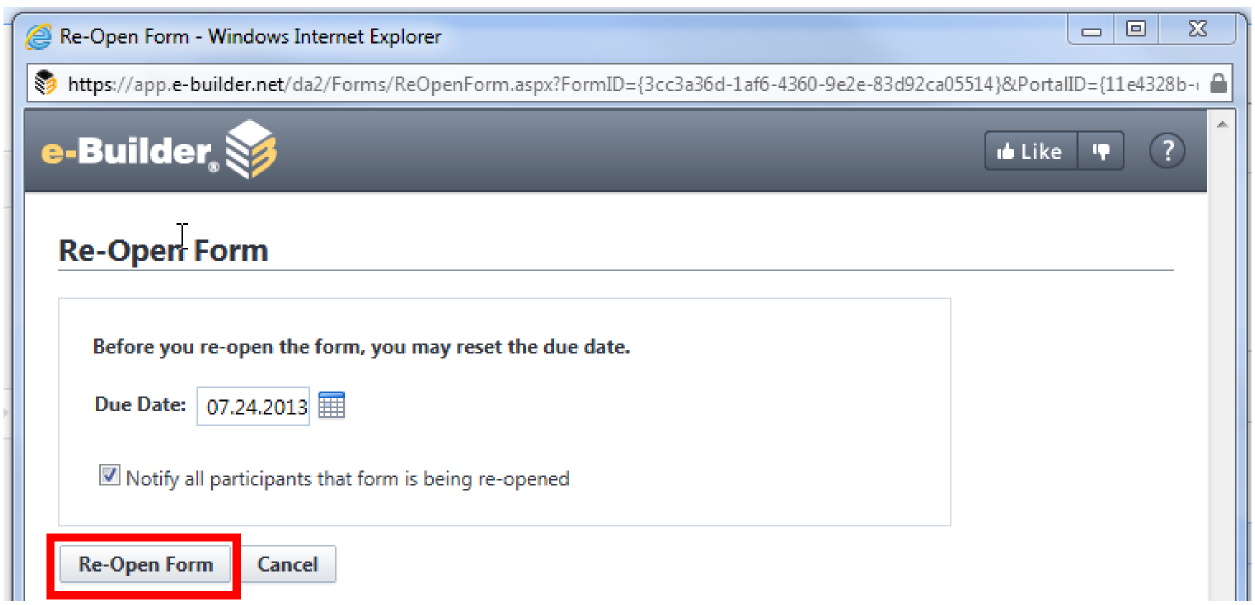
6. *When the form is closed, the due date counter stops and no further updates can be made to the form unless it is reopened.*
7. *To view forms that are closed, go to the Forms tab and filter on closed forms for a project. Closed forms will be displayed in the filter with the detail shaded. This denotes that the form is closed.*



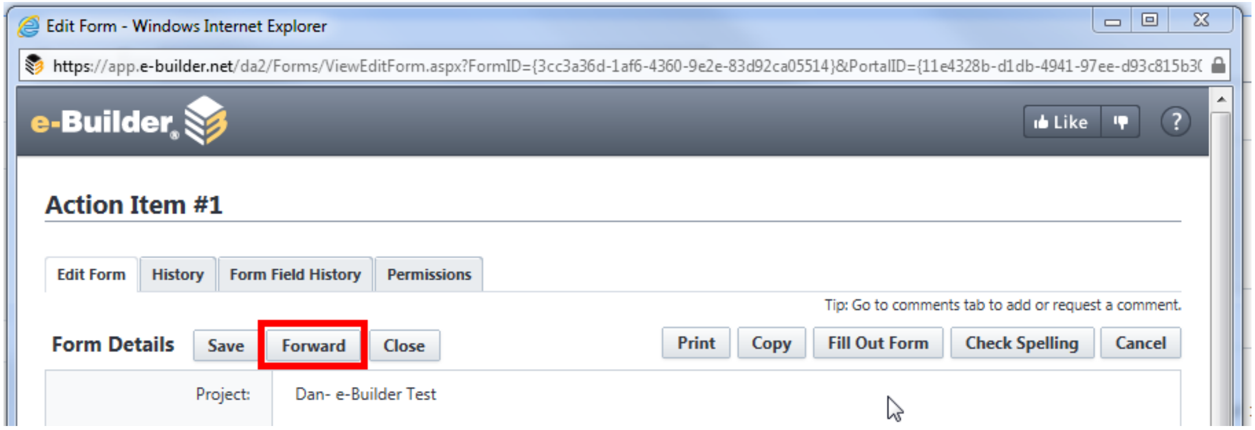
8. *To Re-Open a form, select the closed form and click* ***Re-Open.***



9. *The user will be prompted to reset the due date if applicable.*



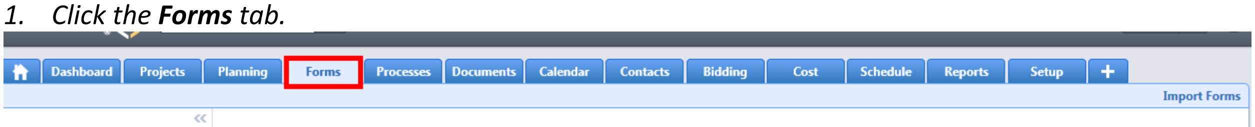
10. *The form is placed in the User's court. The user may now forward this form to any relevant persons.*



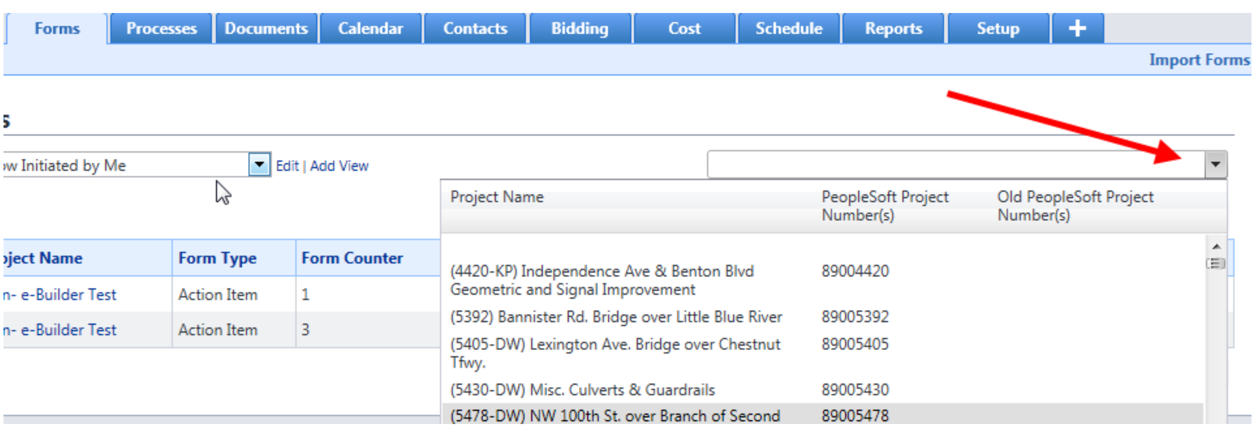
Using Form Filters

Form filters allow you to enter a set of criteria to select a set of form types within a project in order to quickly find the forms that you require.

1. *Click the **Forms** tab.*

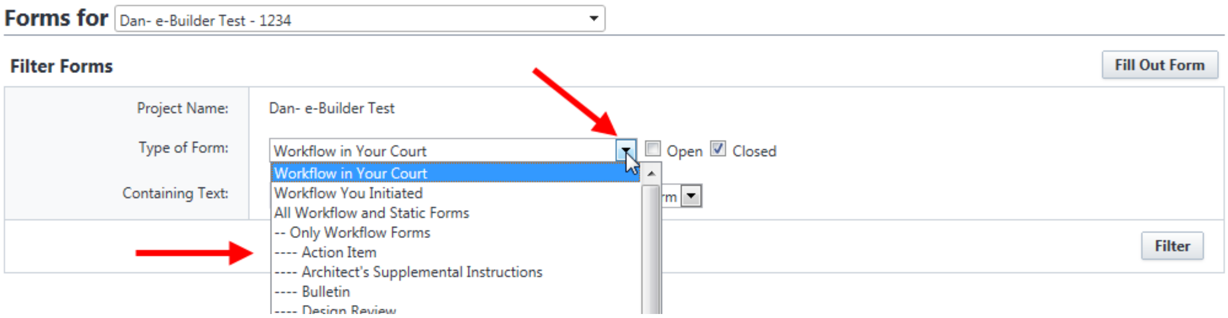


2. *Choose the project by using the Go to Forms for drop-down menu.*

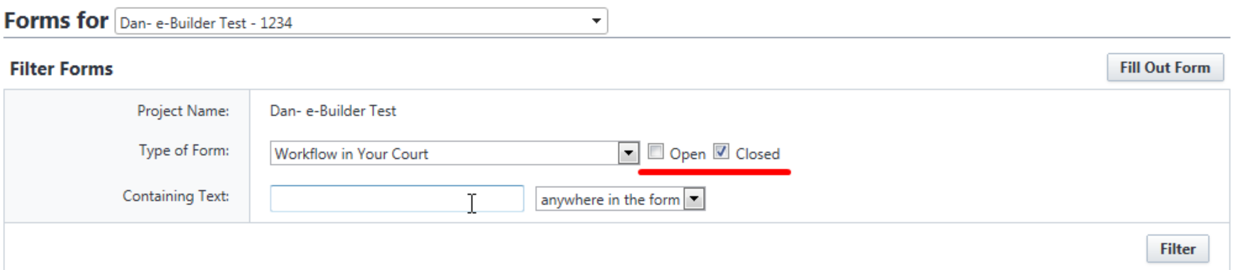


3. *Select the following criteria in the Filter Forms area:*

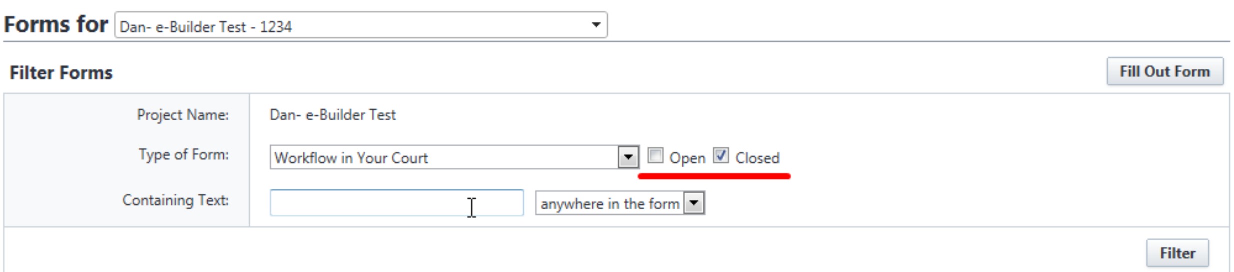
4. ***Type of Form** - The form type or grouping of forms. (e.g. only workflow forms, only Static Forms, Workflow You Initiated, Workflow In Your Court, All Workflow and Static Forms, etc.)*



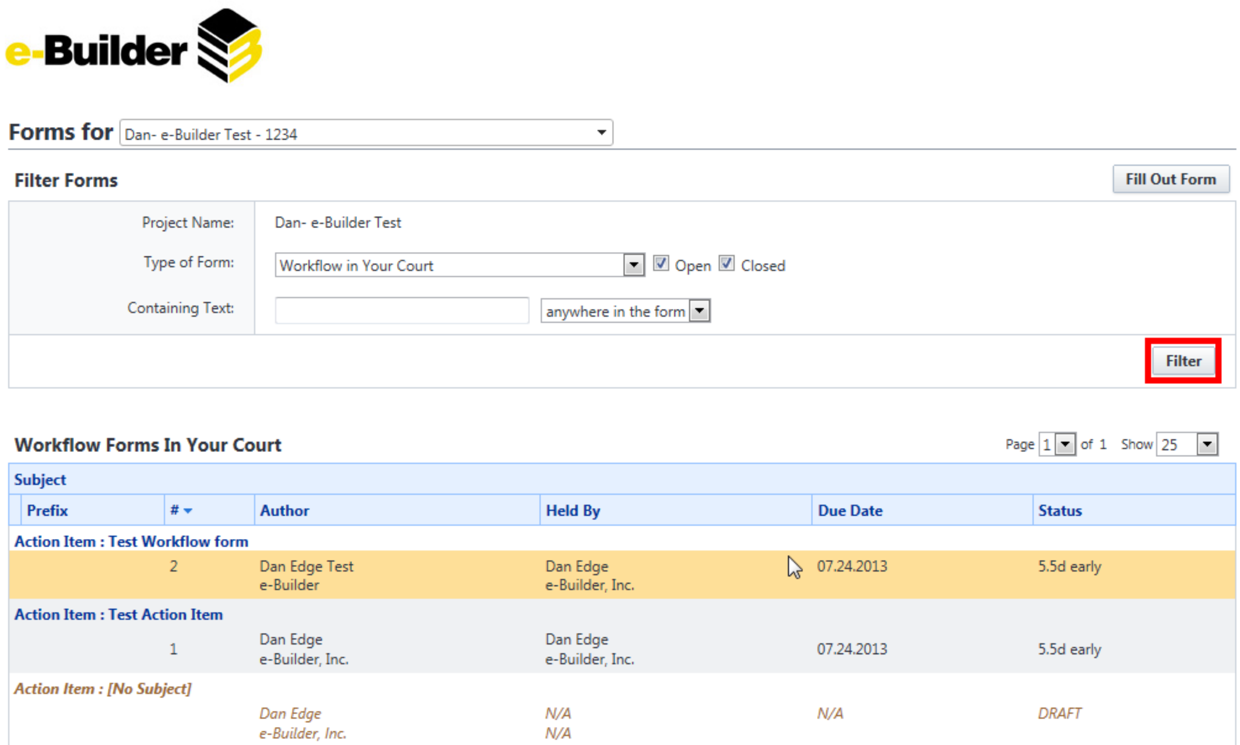
5. ***Open or Closed*** *- The status of the forms.*



6. ***Containing Text*** *-Key words contained within a form or form numbers.*
7. ***Where Located*** *- Where in the form is the "Containing Text" information located. (e.g. anywhere in the form, in the subject only, in the prefix only)*



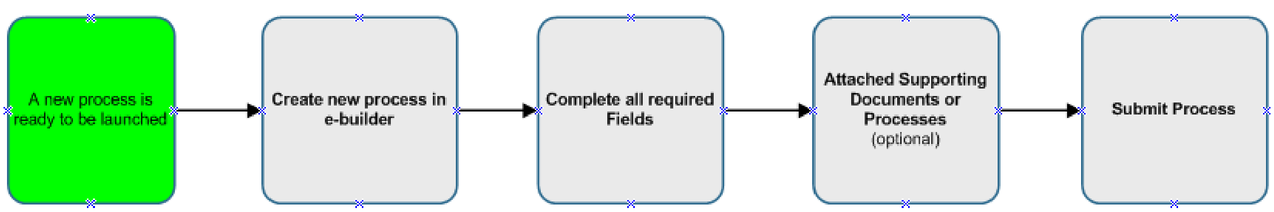
8. *Once you have selected all of your filter criteria, then click the* ***Filter*** *button and your filter results will be returned.*



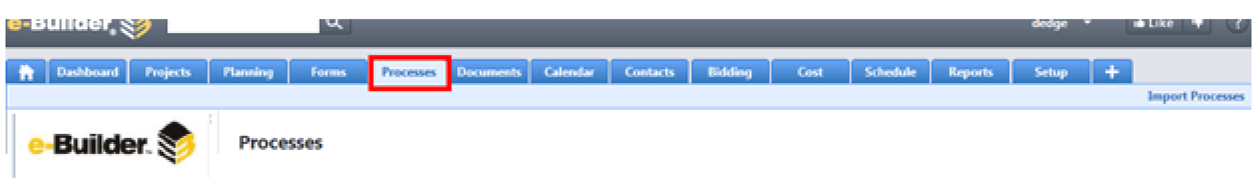
Process Module

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. This module is a set of enhanced features expanded from the e-Builder Forms module.

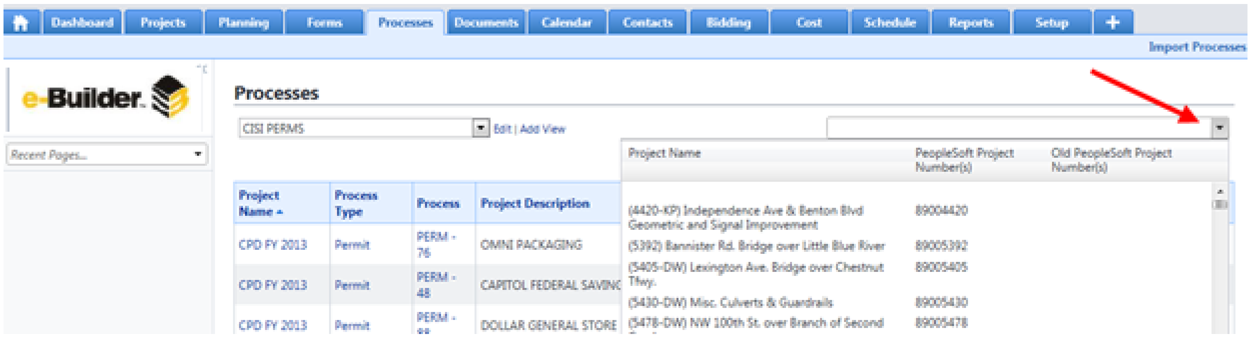
Initiating a Process



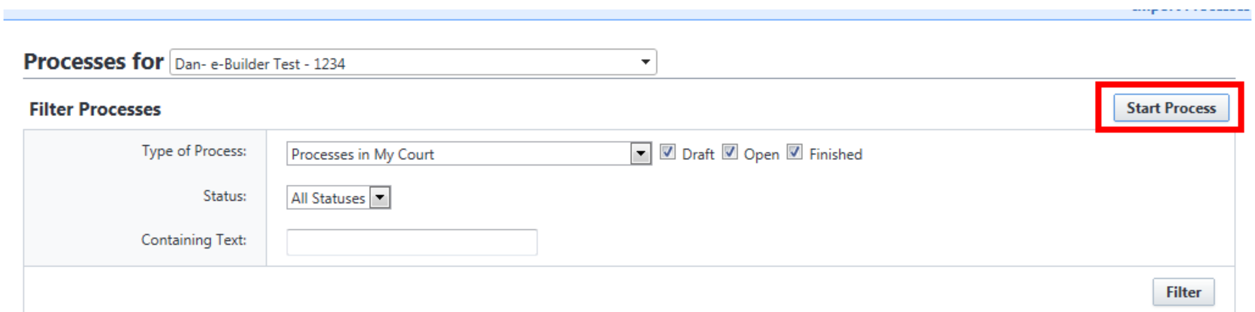
1. *Go to the **Process** tab.*



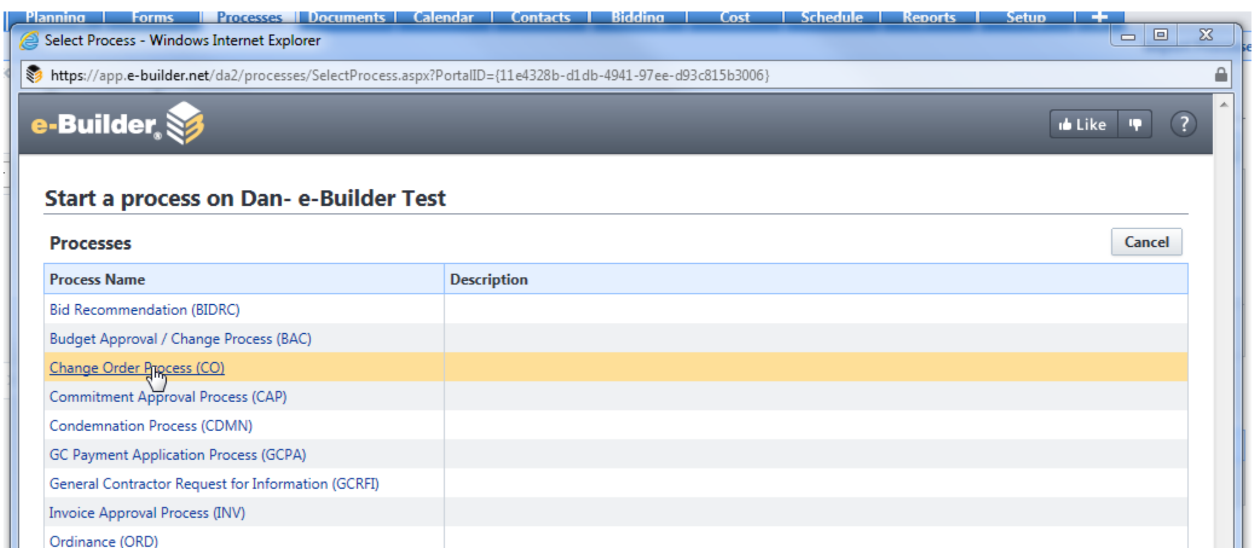
2. *Select project you wish to initiate the process for*



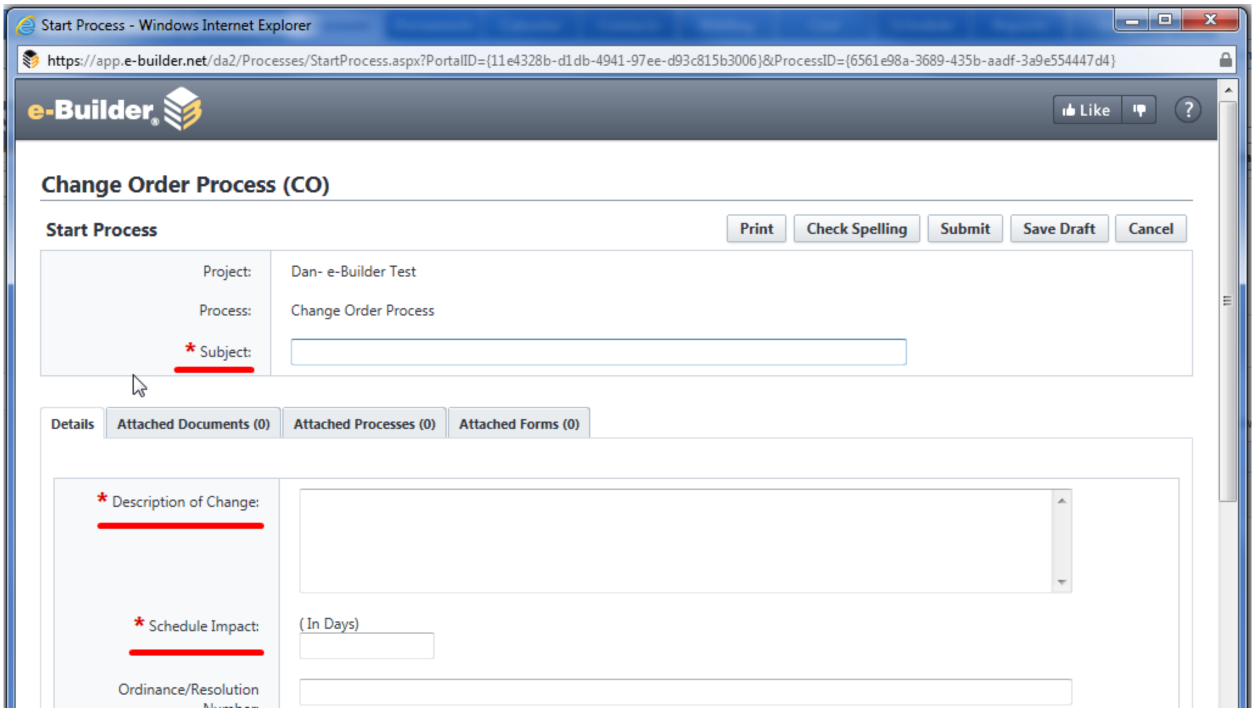
*3. Click **Start Process**.*



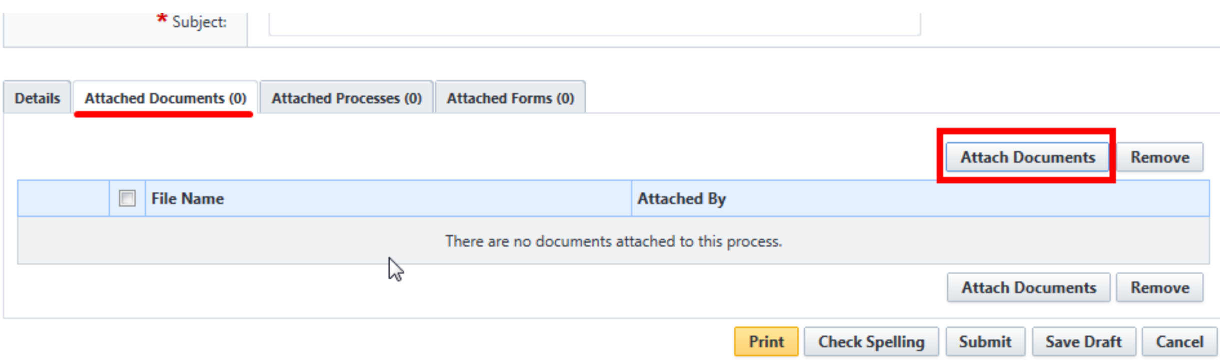
4. Select process type.

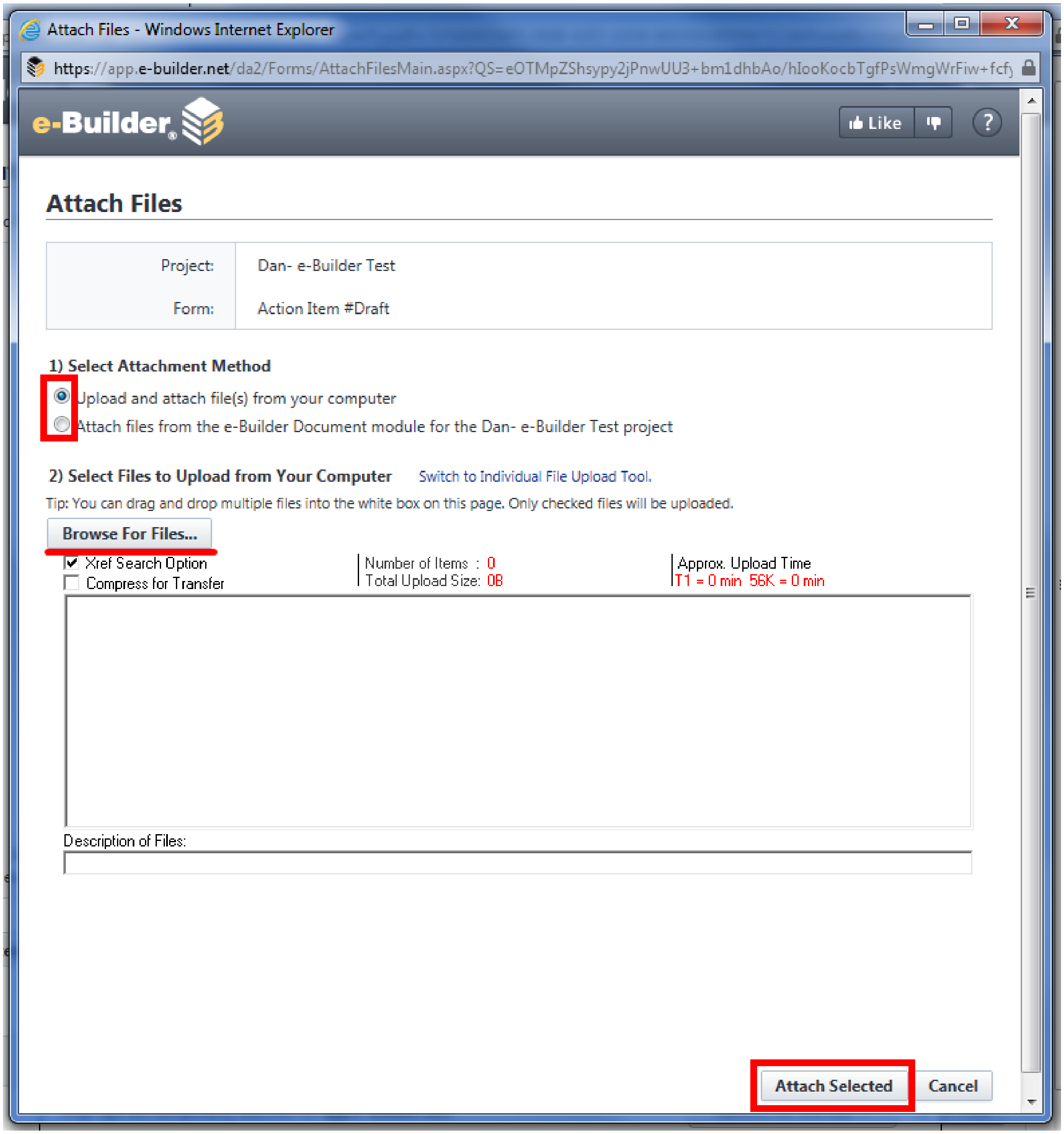


5. Fill in all required fields (as noted in red).



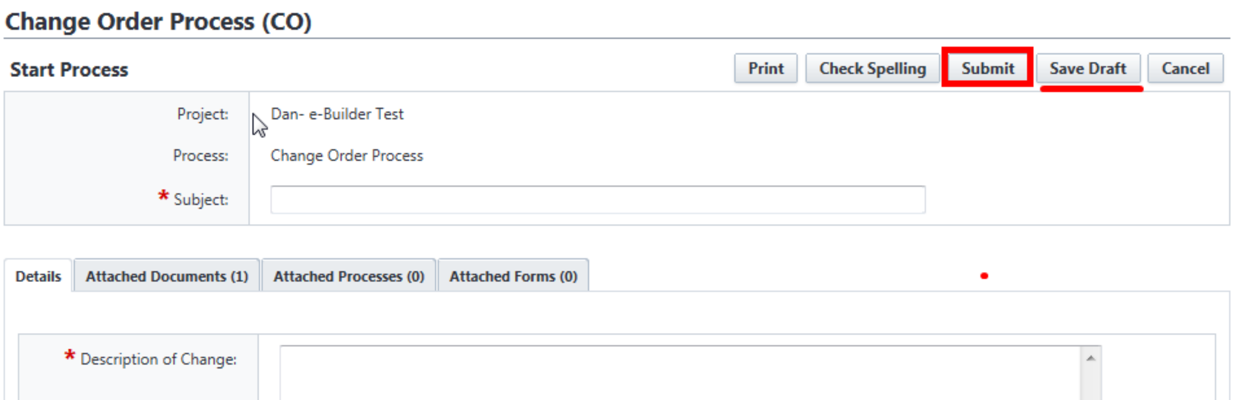
6. *Attach back up documentation if needed by clicking Attached Files tab. An Attach files screen will be displayed. You can attach documents to a form in three ways:*
   - *Method 1: Drag and drop files using the same upload procedure as defined in the Documents module. (See Uploading Documents for help)*
   - *Method 2: Select 'Upload and attach file(s) from your computer ' and click Browse For Files*
   - *Method 3: Select 'Attach files from the e-Builder Document module for the Dan- e-Builder Test project' and click Browse For Files. Choose the Folder and you will see your folder structure for the selected project.*
   - *Click **Attach Selected***





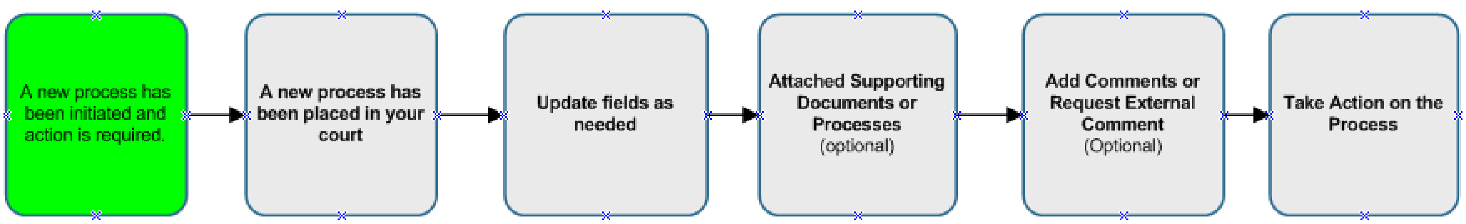
7. *Attach Processes by selecting tab and clicking* ***Attach Processes****.*

8. *Use the filter to find appropriate process(es); check boxes to left of desired process(es) and select **Attach**.*
9. *In a similar fashion, use the Attached Forms tab to attach any relevant forms if necessary.*
10. *Click **Submit**. If you are not ready to submit choose **Save Draft**.*

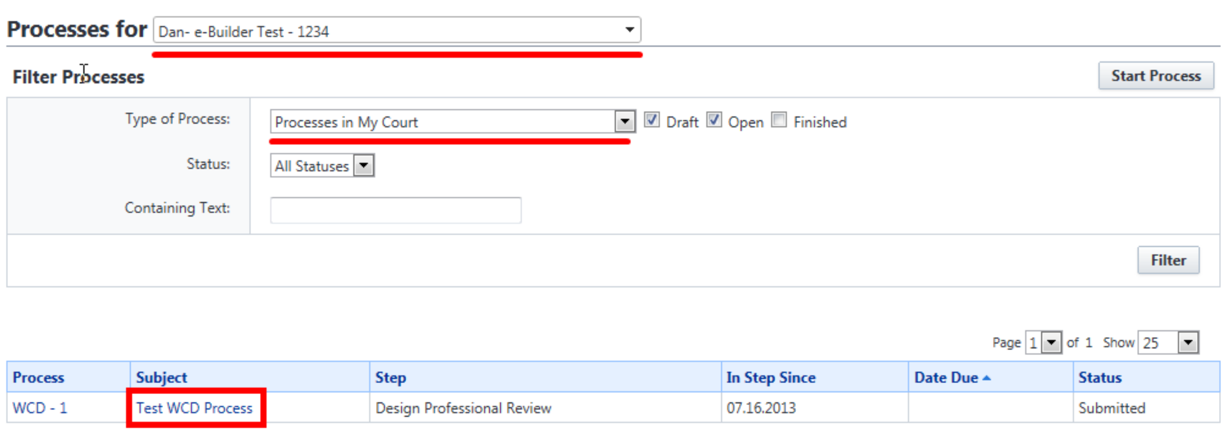


11. *The workflow will automatically be sent to the next "actor" in the process.*

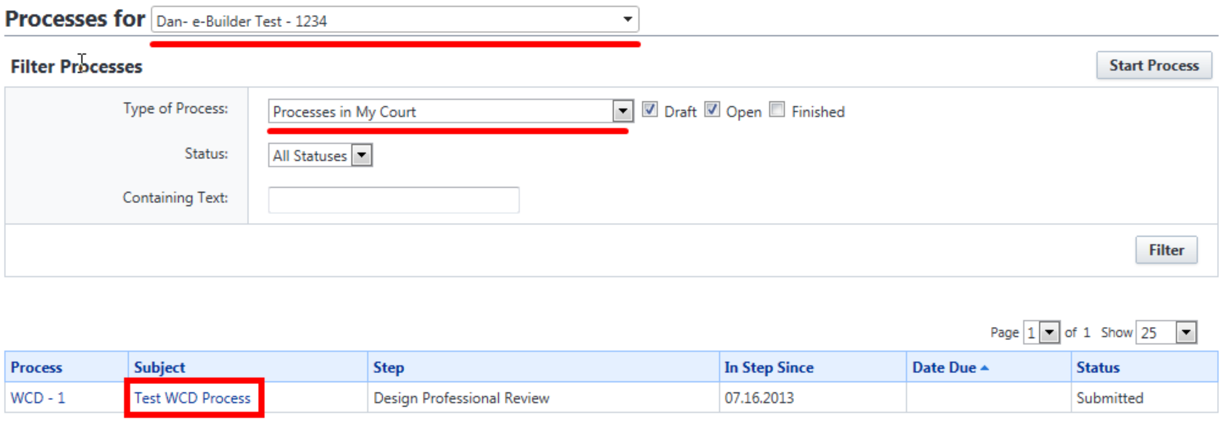
Responding to a Process



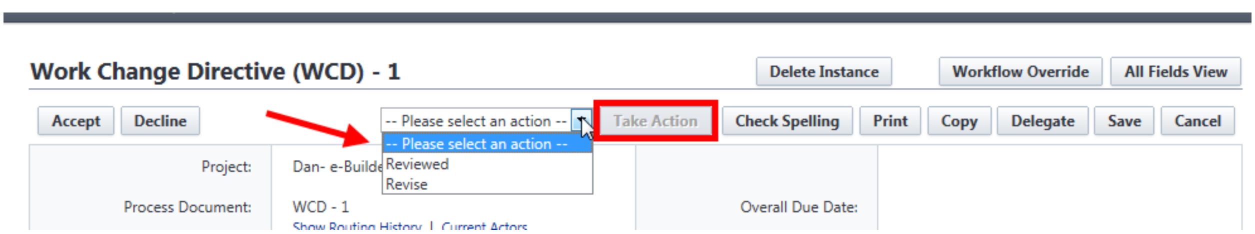
1. *Go to the **process** tab (you will also receive an email notification when an action is assigned to you).*
2. *In the type of process filter drop down menu, select the **Processes in my Court.***
3. *Click the SUBJECT of the process, a new process window will be displayed.*



4. *Update the fields with your response, required fields are noted in red.*
5. *Click **Save** to store any added information without taking an action.*



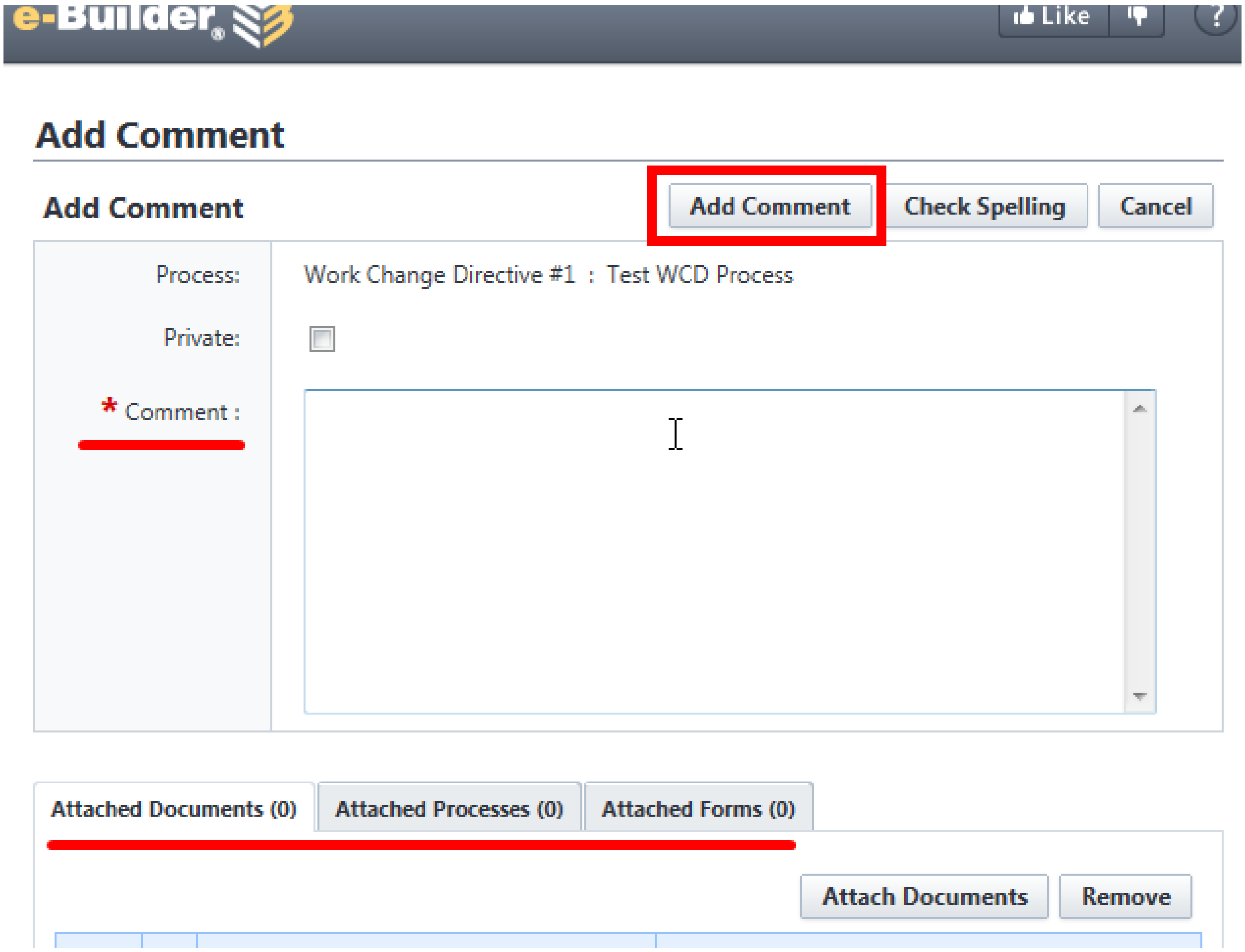
6. *Attach documents, forms, or processes if necessary (See Initiating a Process, above, for more info)*
7. *Select action from drop down box, click **Take Action**.*



Adding a Comment

1. *Click the **Comments** tab within a process and press **Comment**.*

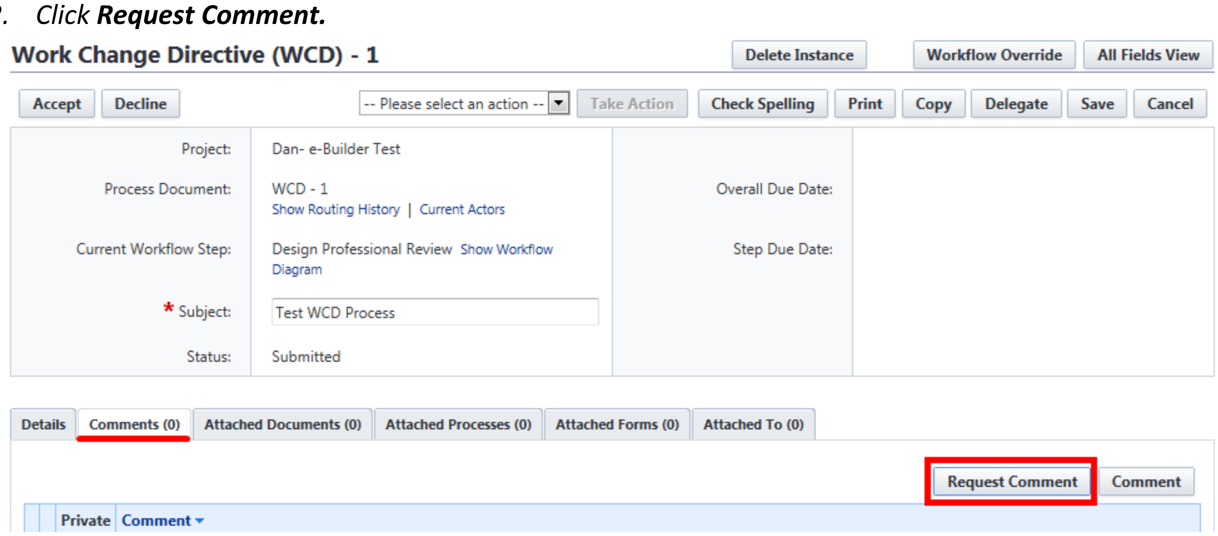
2. *Fill in comment field*
3. *Click **Add Comment** tab.*



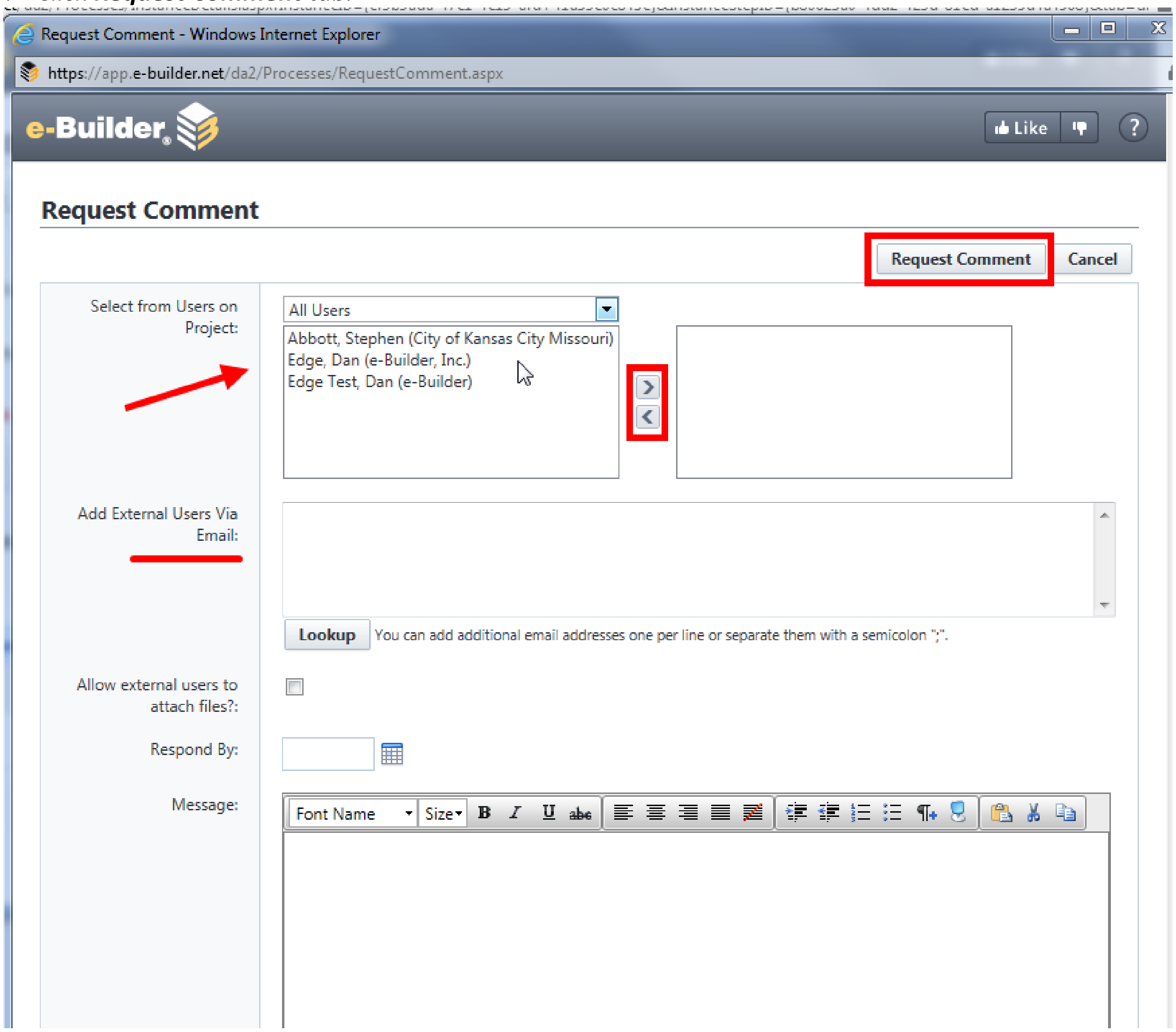
4. *Attach documents, forms, or processes if necessary (See Initiating a Process, above, for more info)*

Request External Comments

1. *Click the **Comments** tab within a process.*
2. *Click **Request Comment.***

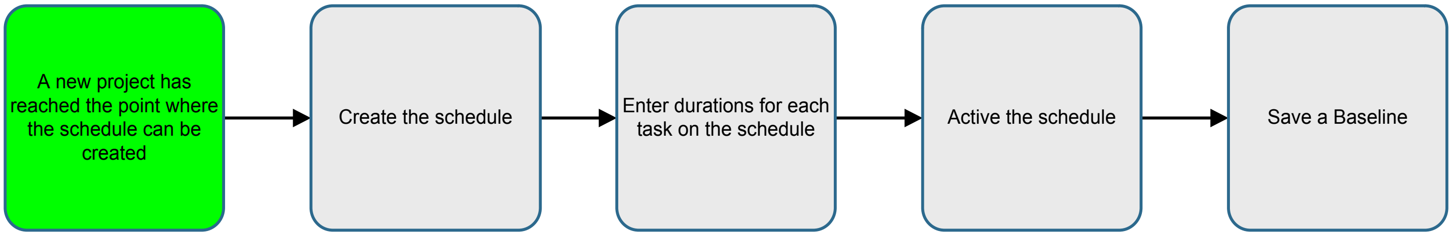


3. *Select from users on the project or add external users.*
4. *Add message, respond by date, and the ability for external users to attach files. (optional)*
5. *Click **Request Comment** tab.*



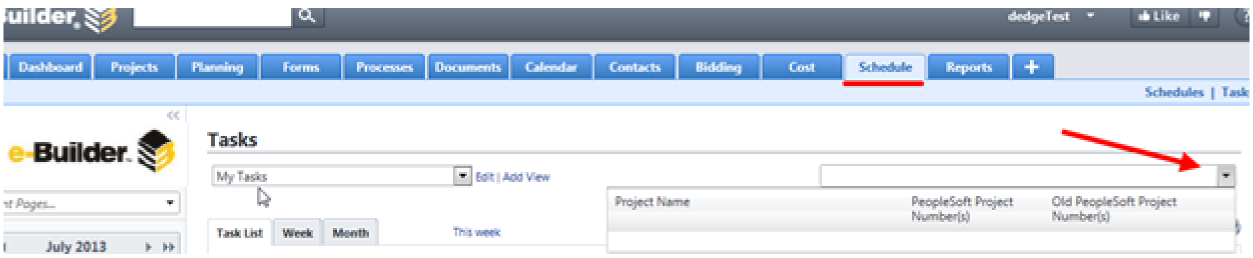
Schedule Module

The e-Builder Schedule module allows the project manager and team members to access and update the schedule in real time. This keeps everyone associated with the project up to date with all changes as they happen.

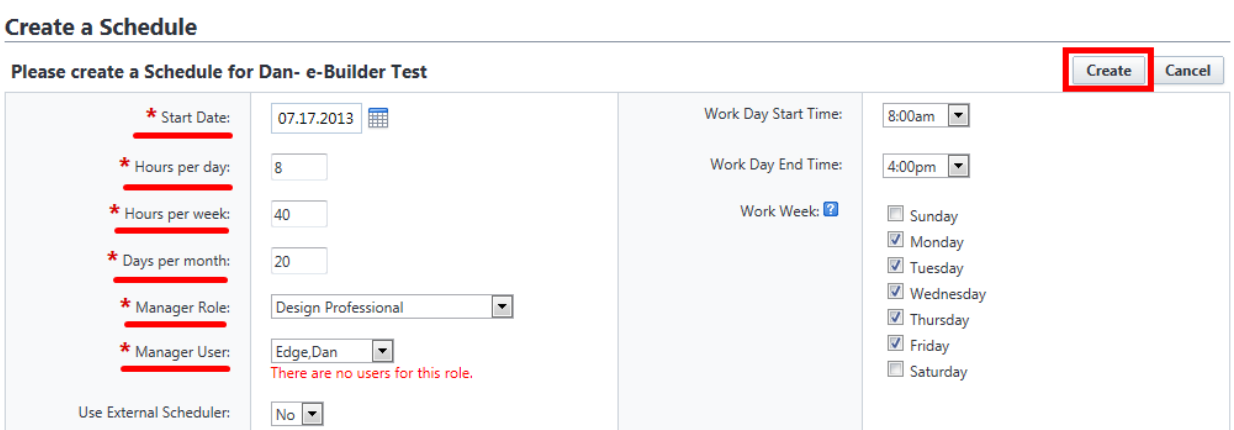


Creating a Schedule

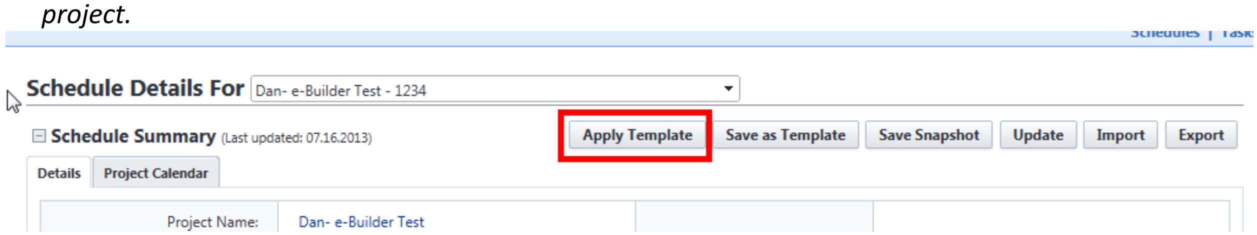
1. *Go to the **Schedule** tab.*

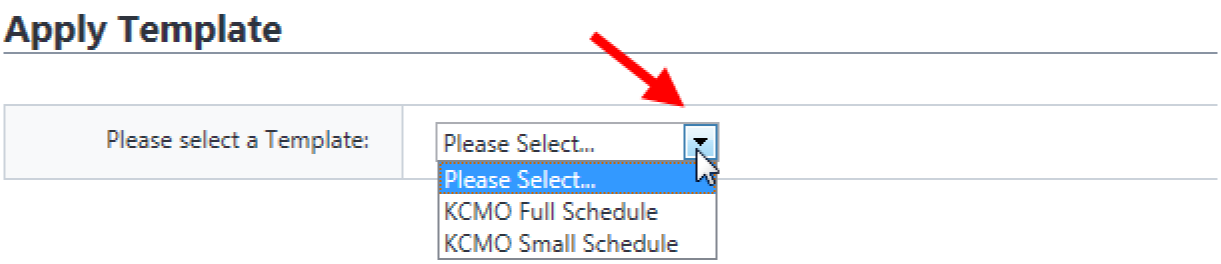


2. *Select the project you need to create the schedule for.*
3. *Input required schedule information (if prompted), click **Create**.*

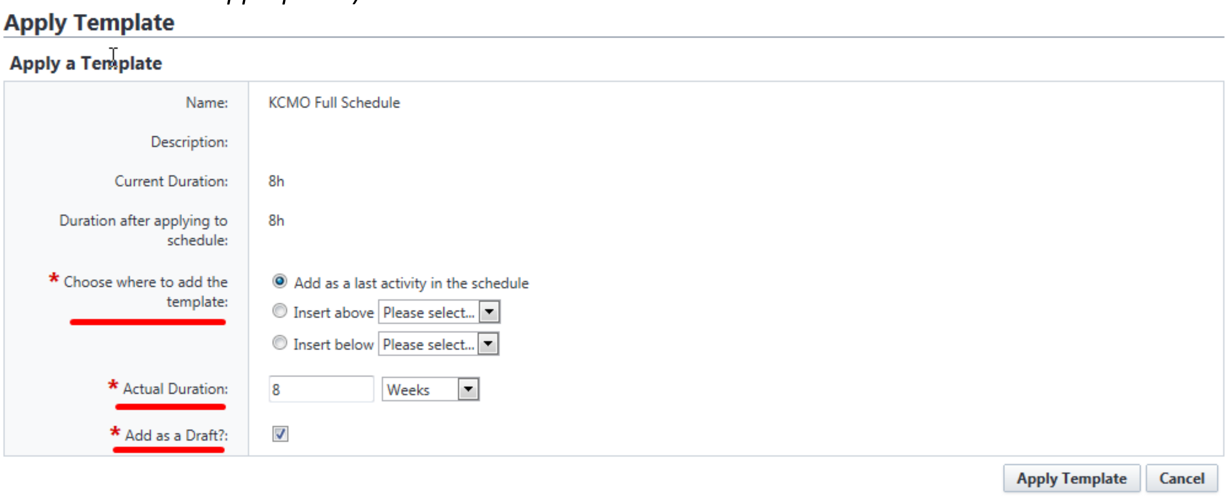


4. *Click the **Apply Template** button and select the appropriate template for the size and scope of your project.*



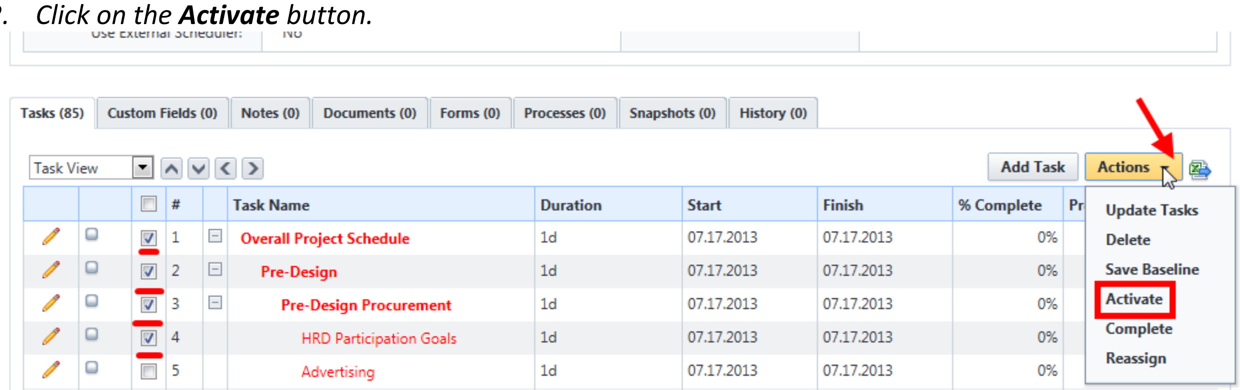


5. *Fill in required information (Note: the default is set to add as last activity in schedule but can be altered when appropriate)*

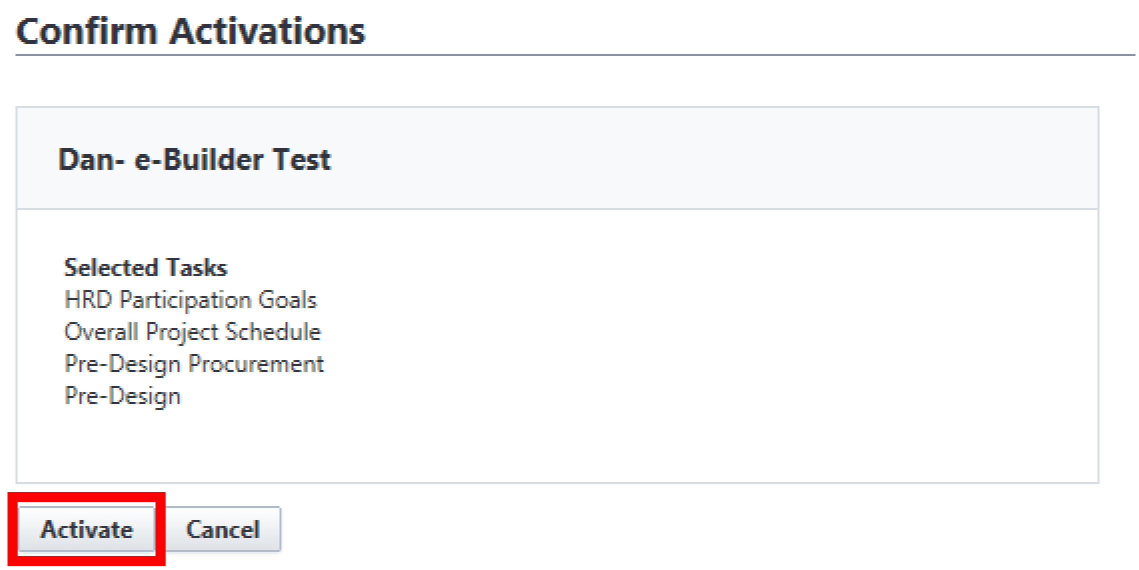


Activating the Schedule

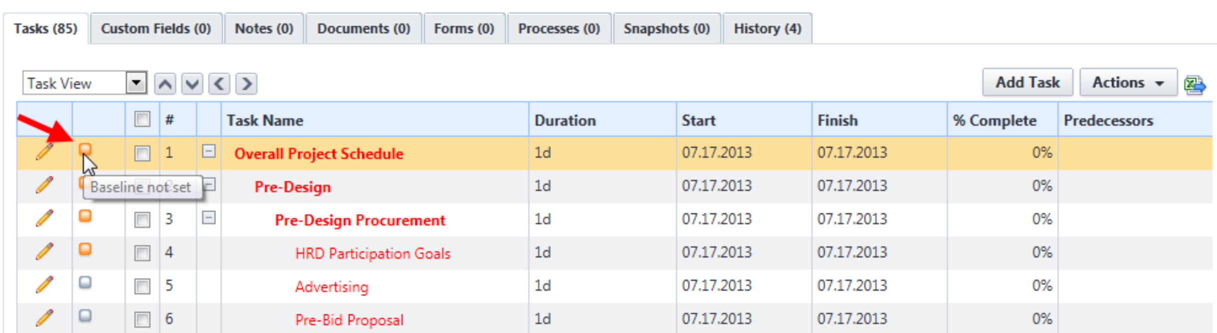
1. *Select the task(s) to be activated by clicking on the check box next to their sequence number.*
2. *Click on the* ***Activate*** *button.*



3. *Click "Activate" to confirm*

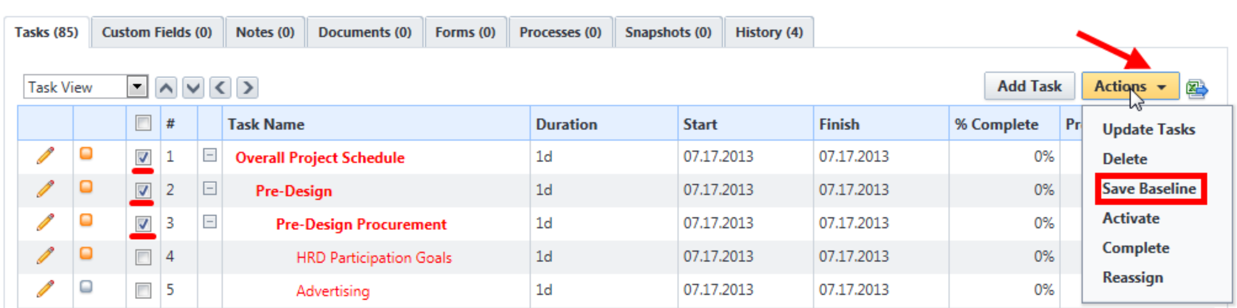


Note: ID light will change from gray to orange; mouse hover will display "Baseline not Set" vs. "Draft"



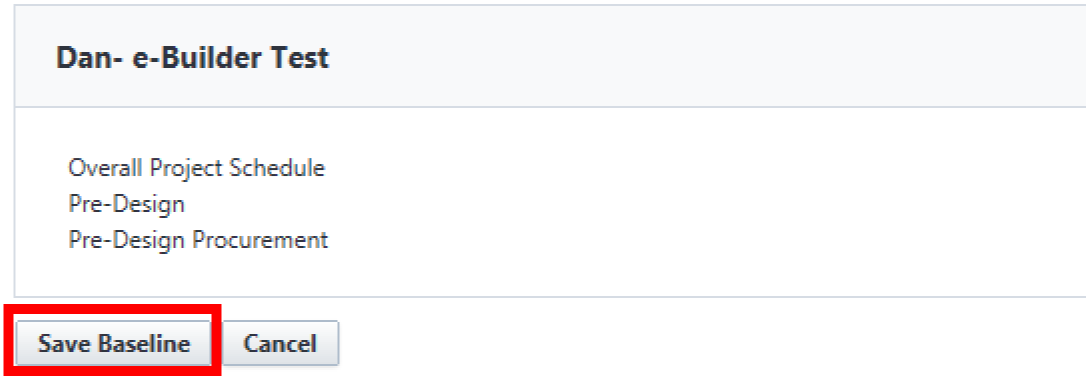
Saving a Baseline

1. *Select the active task(s) to baseline by clicking on the check box next to their sequence number.*
2. *Click on the **Save Baseline** button.*

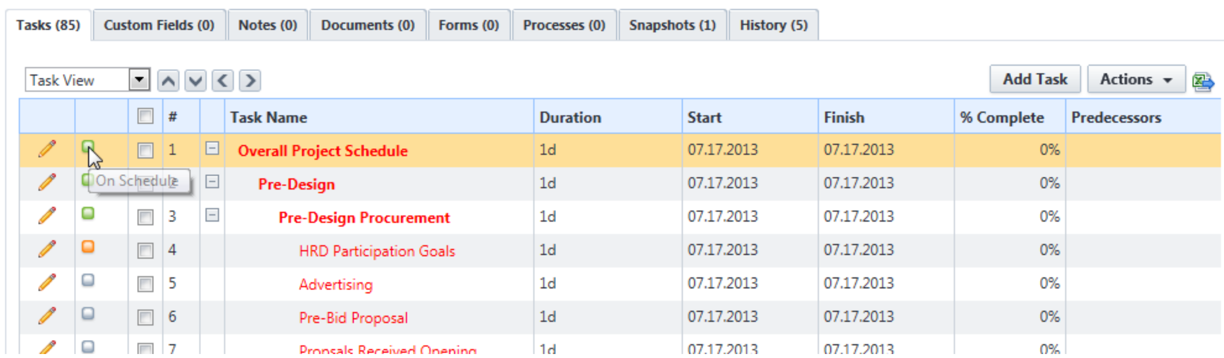


3. *Click **Save Baseline** to confirm.*

Confirm Baselines

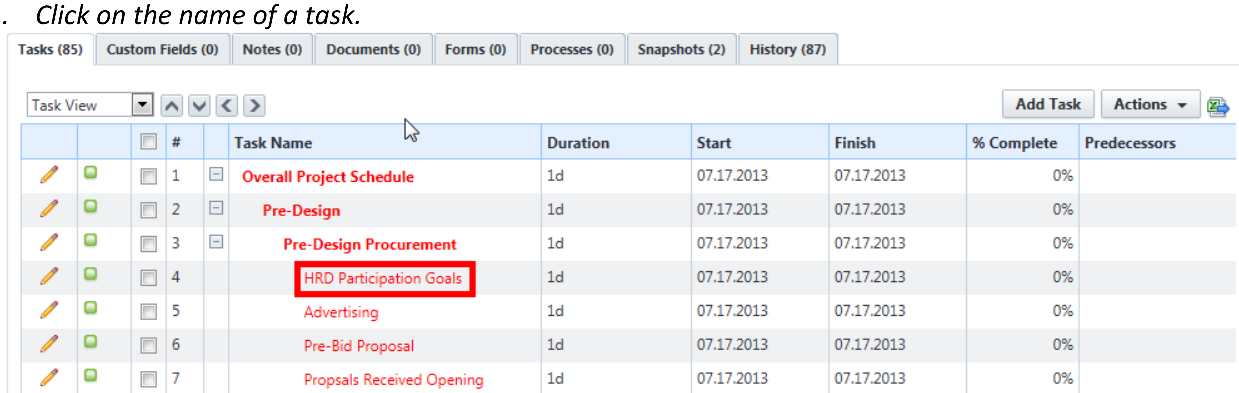


Note: ID light will change from orange to green, yellow, or red based on task status



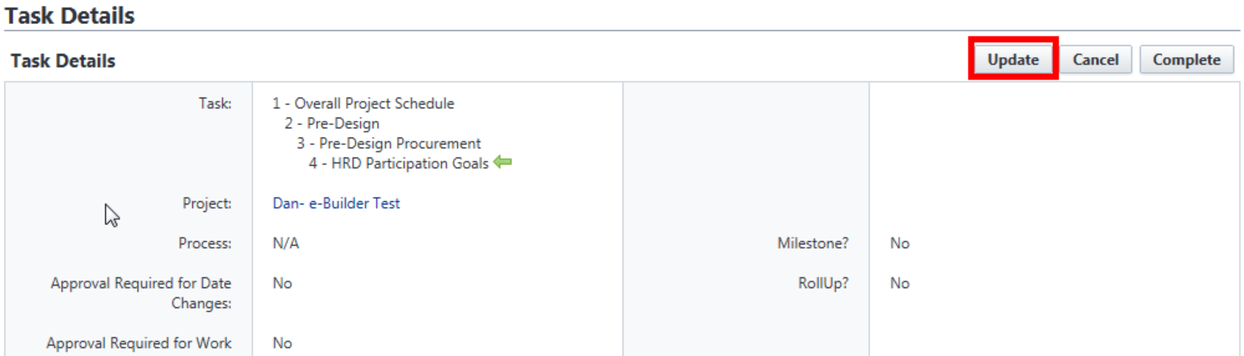
Updating Tasks

1. *Click on the name of a task.*

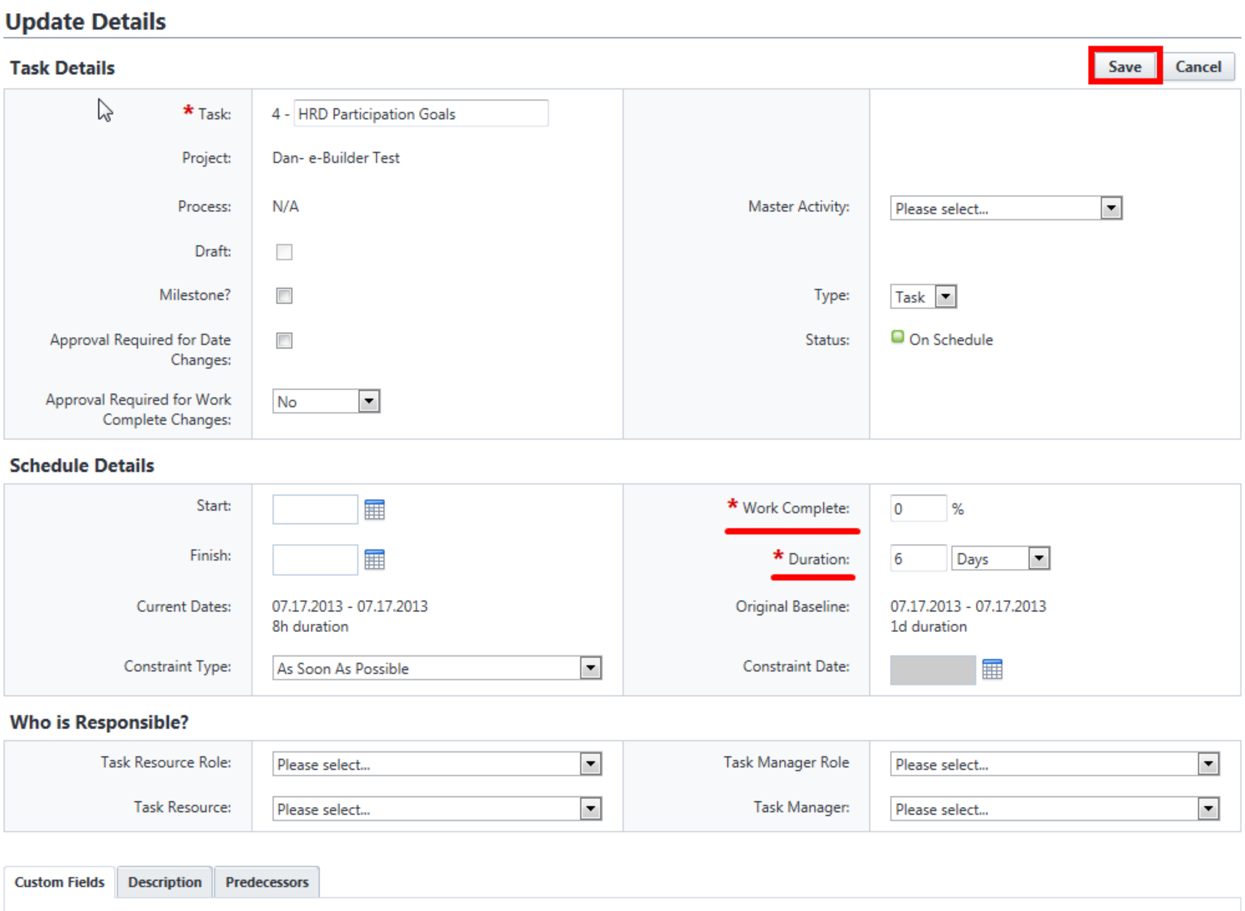


2. *Click on the **Update** button.*

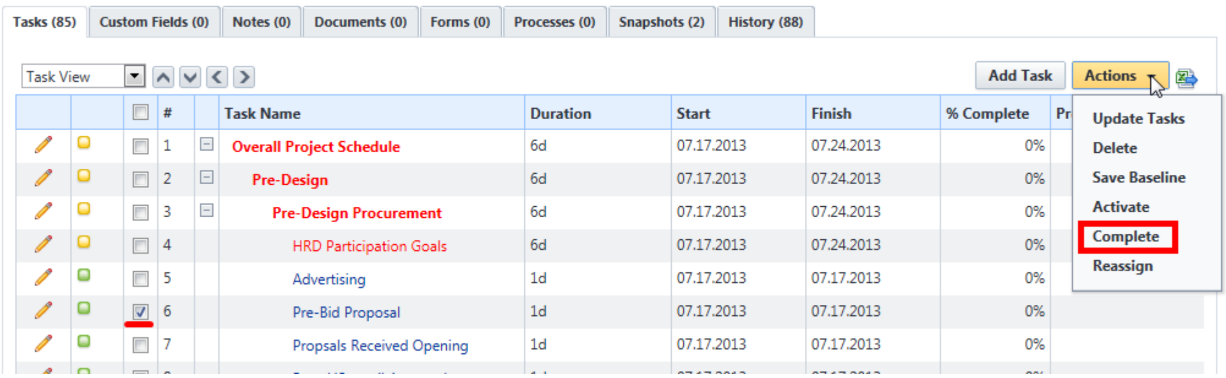
e-Builder



3. *Enter the updated duration, % complete, or other updates to the task.*
4. *Click **Save.***



5. *If a task needs to be marked as complete with no other changes:*
   - *Select the check box next to the name of the task.*
   - *Click on the **Complete** button.*



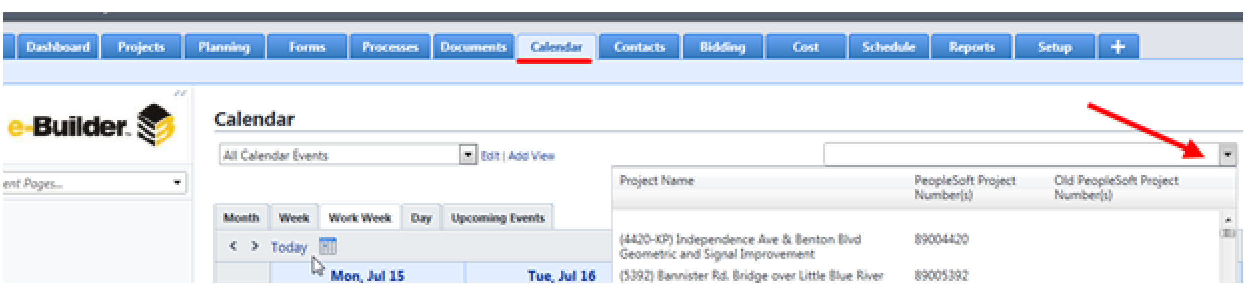
Calendar Module

The e-Builder Calendar Module is a project-specific calendar that brings all project participants, internally and externally, together. It integrates with Microsoft Outlook, synchronizing your e-Builder calendar events to your Outlook calendar. If your project team consists of multiple companies using multiple calendars, e-Builder functions as the central calendar management tool.

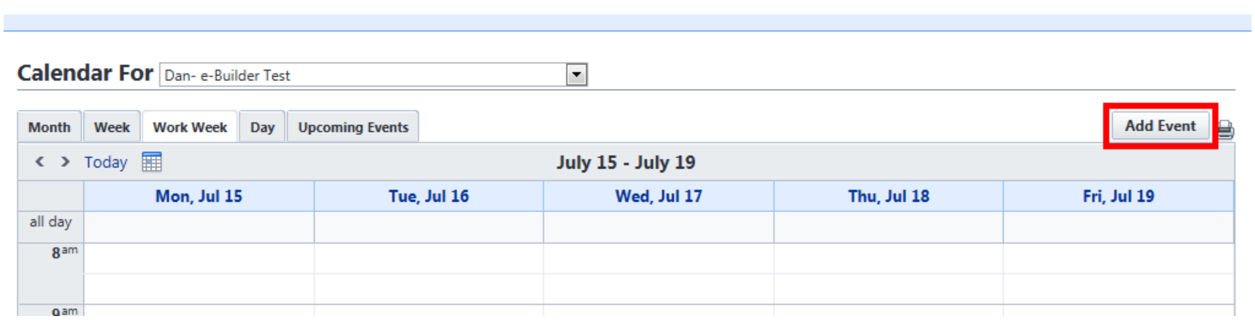
Creating an Event

In e-Builder's Calendar module, events can be created at an account level or for an individual project. Each event can be scheduled to occur on a one-time basis or with a daily, weekly or monthly recurrence.

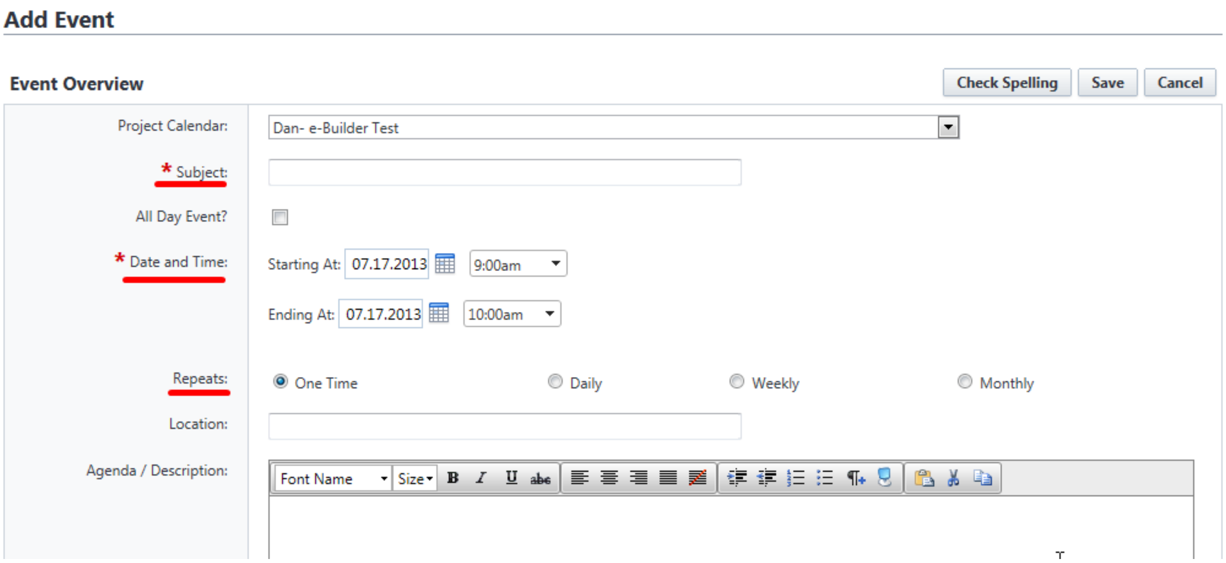
1. *Select a project from the 'Go to Project Calendar for' drop-down menu. (If an event is created without selecting a project, the event will not be associated with a project. It will be displayed across all projects.)*



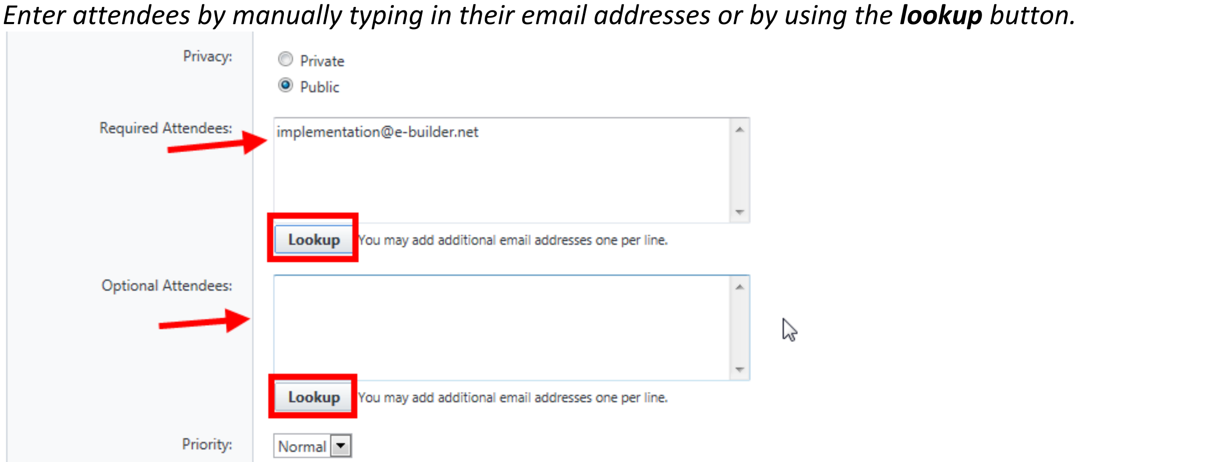
2. *Click the **Add Event** Button.*



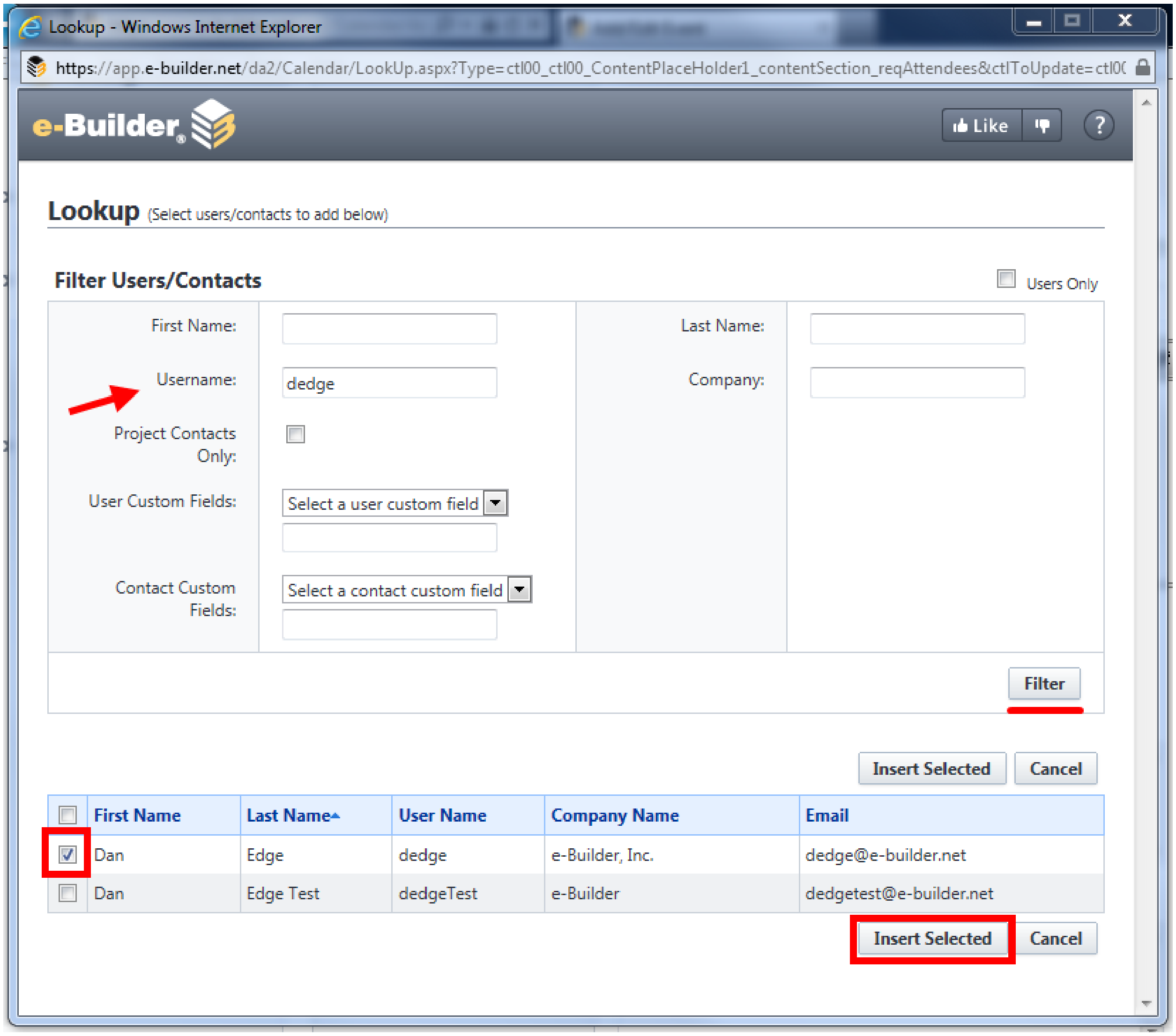
3. *Enter a title for the meeting in the Subject field.*
4. *Enter start and end dates and times along with recurrence information, if needed.*



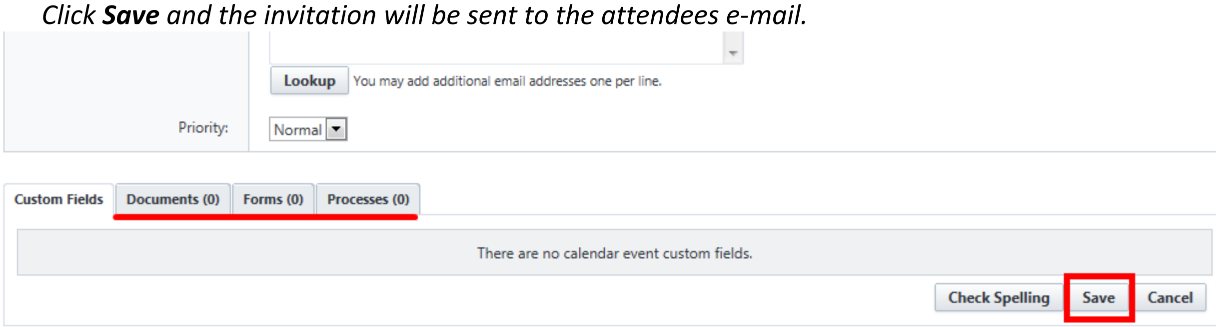
5. *Fill in other fields as necessary.*
6. *Enter attendees by manually typing in their email addresses or by using the* ***lookup*** *button.*



7. *For Lookup function, filter contacts and* ***insert selected****.*

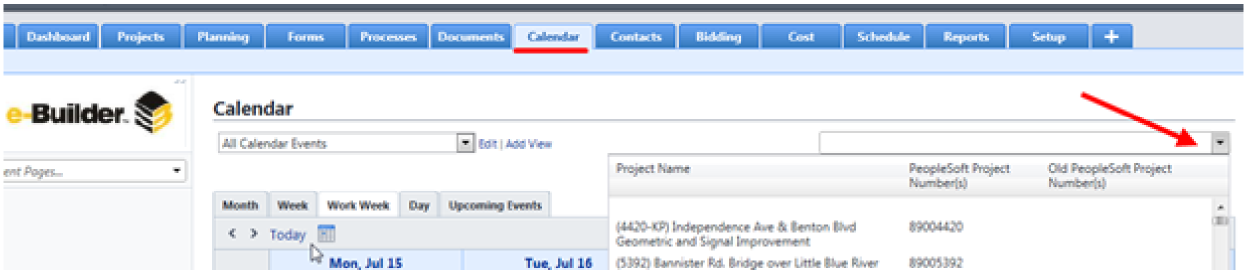


8. *Attach documents, forms, or processes if necessary (See Initiating a Process, above, for more info.) Click **Save** and the invitation will be sent to the attendees e-mail.*

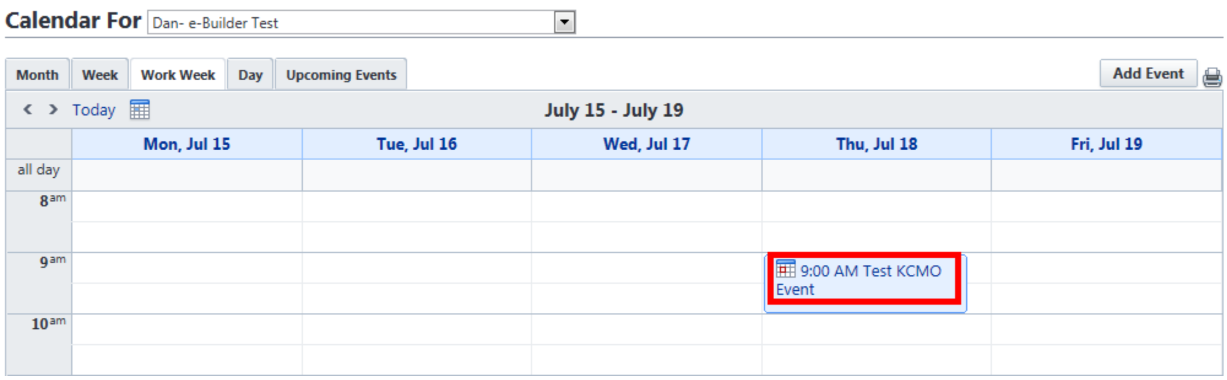


Editing or Deleting an Event

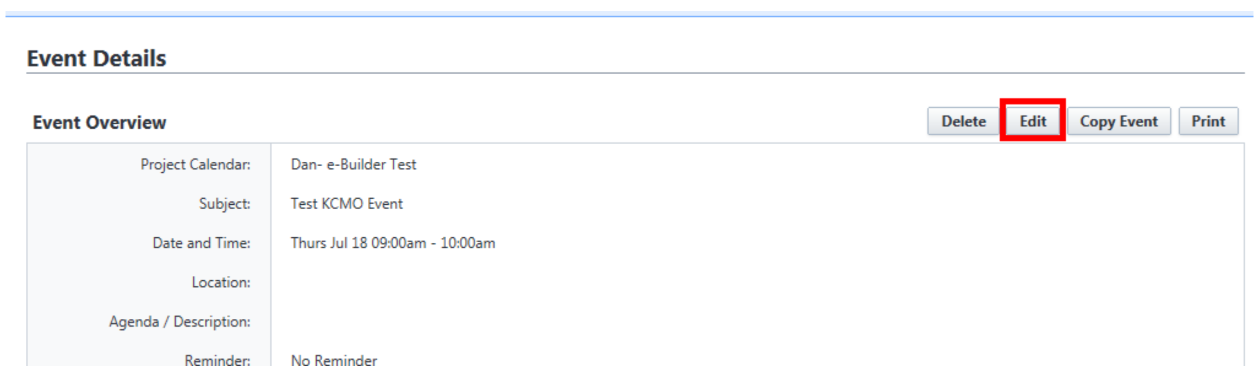
1. *Select a project from the Go to Project Calendar for drop-down menu.*



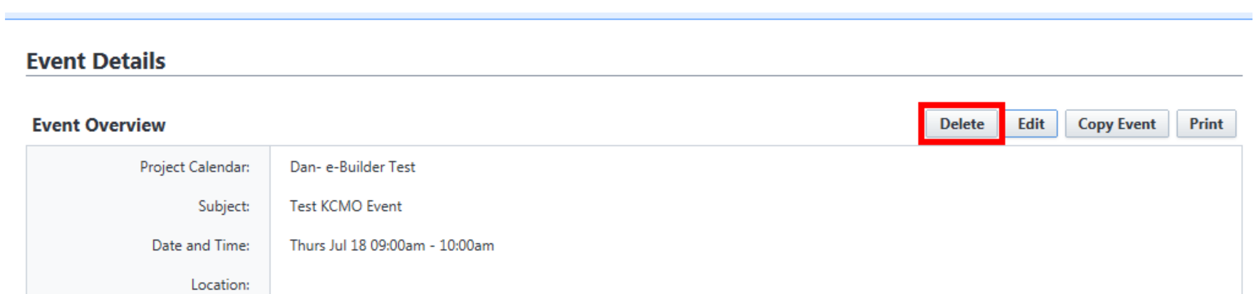
2. *Click on the link with the event name.*

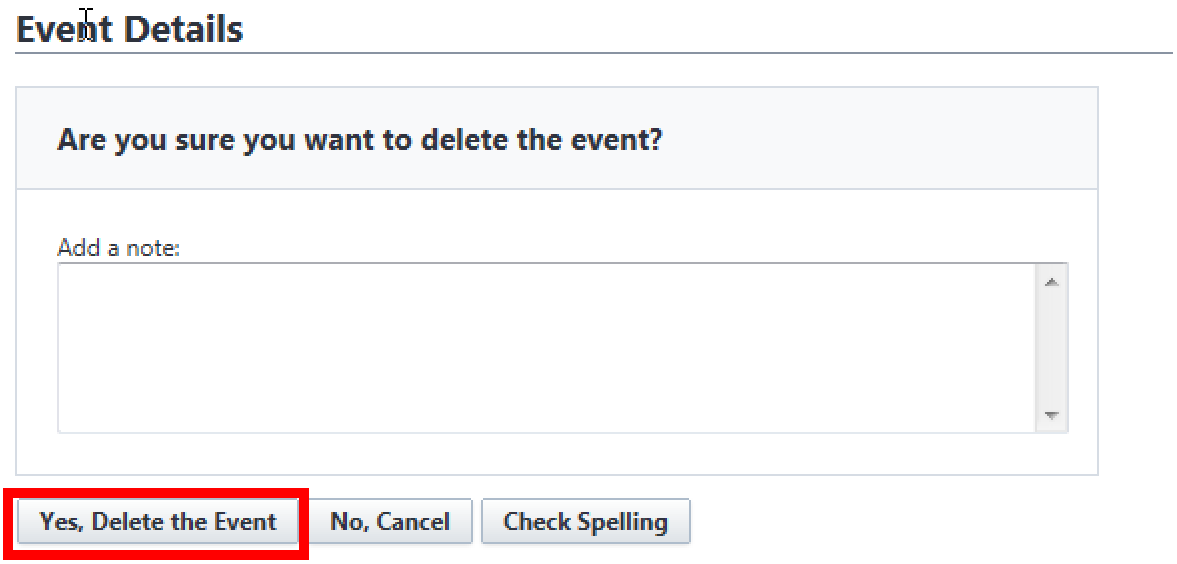


3. *Click the **Edit** button. Make necessary changes and **Save** event. (Attendees are emailed updated information)*



4. *To delete event, press **Delete** and **Yes** to confirm deletion.*

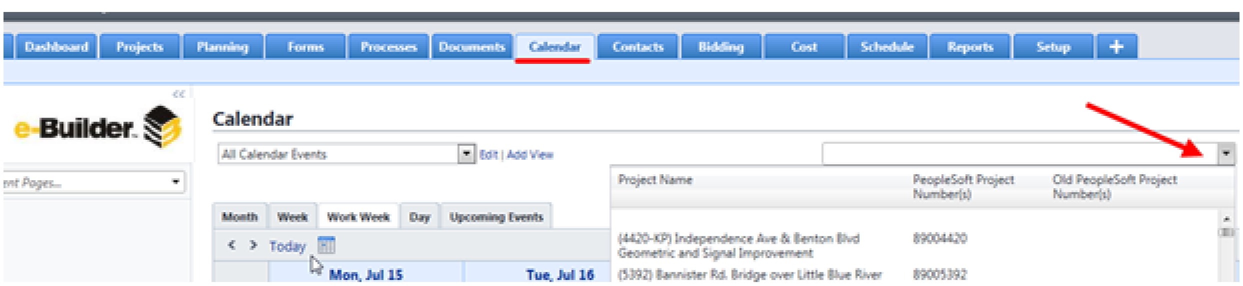




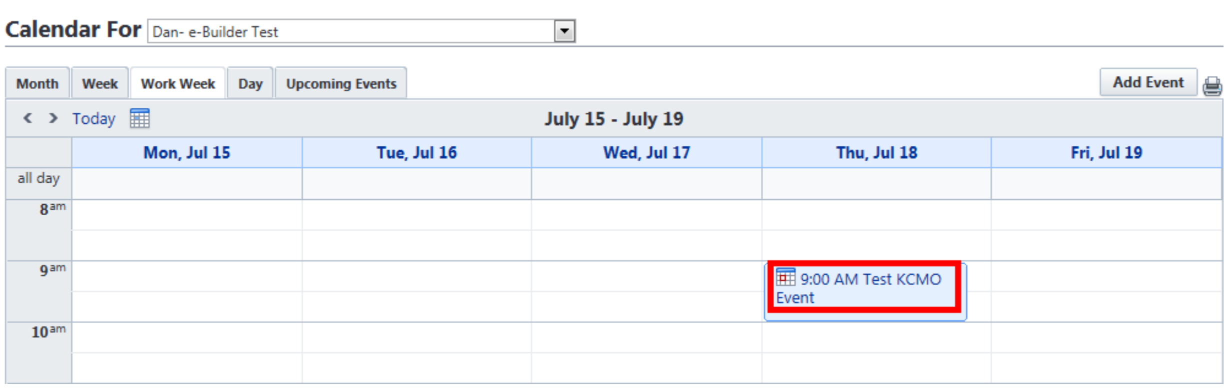
Updating Attendance

The meeting organizer can indicate whether or not an invited member attended the meeting or not. (Event must be past its start time/date)

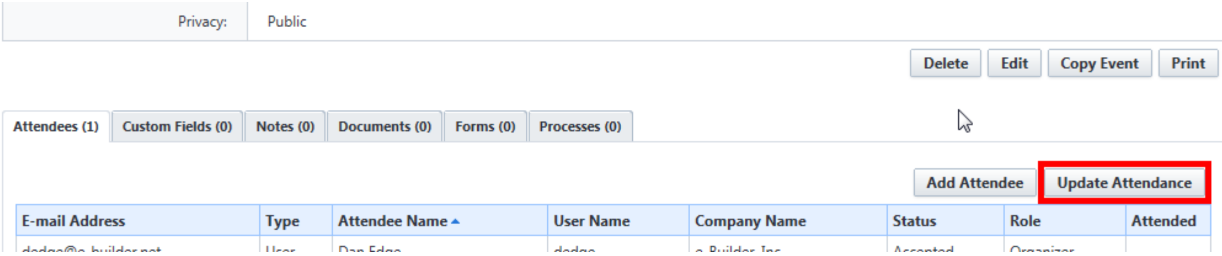
1. *Select a project from the Go to Project Calendar for drop-down menu.*



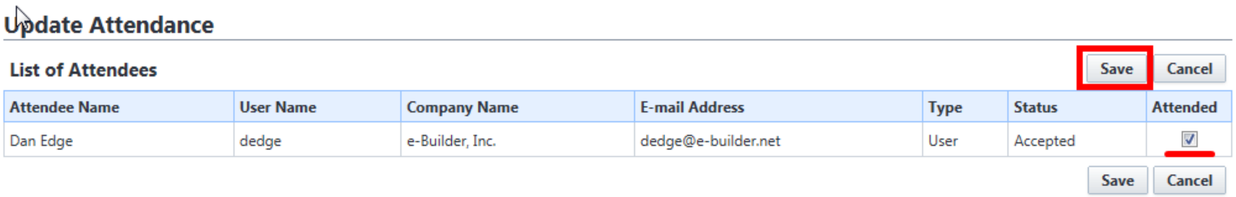
2. *Click on the link with the event name.*



3. *Click on the* ***Update Attendance*** *Button.*



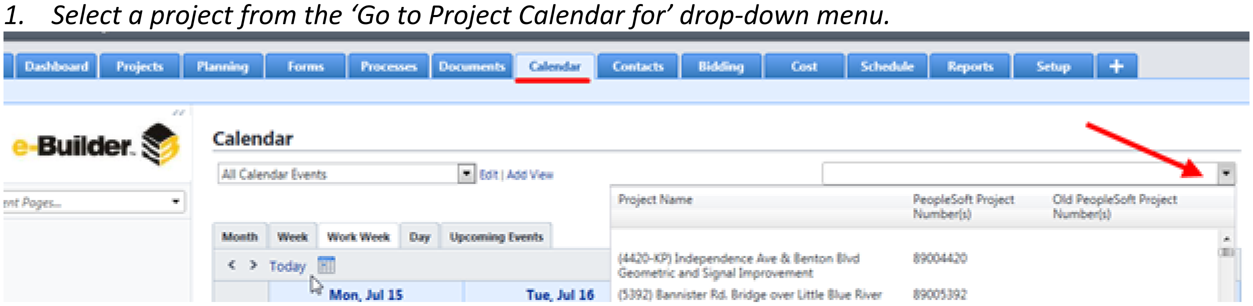
4. *Select the checkbox under the Attended column (for each member that was present). E.-Builder will ask if you want to update only added/deleted attendees. Make the desired choice.*
5. *Click **Save**.*



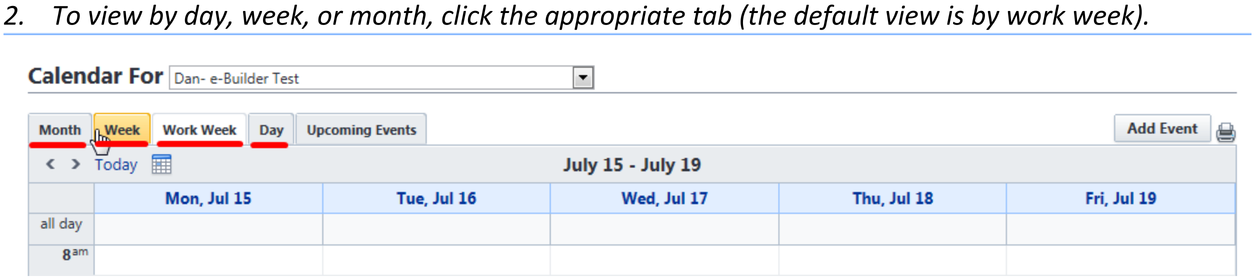
Calendar Views

Within a project calendar, a user can view the calendar by workweek, week, day, month, or a 30 day look ahead at events contained across all projects.

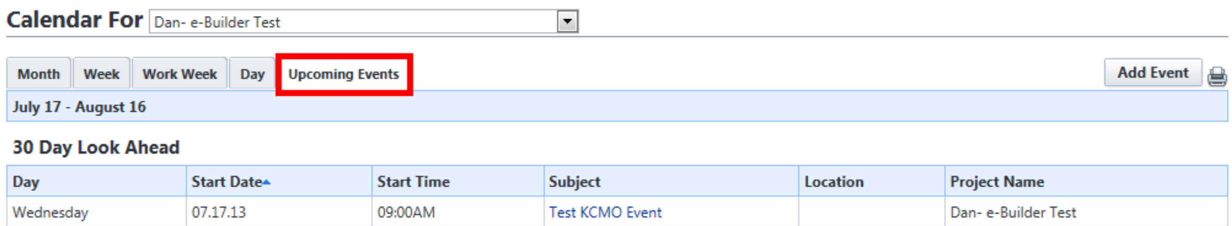
1. *Select a project from the 'Go to Project Calendar for' drop-down menu.*



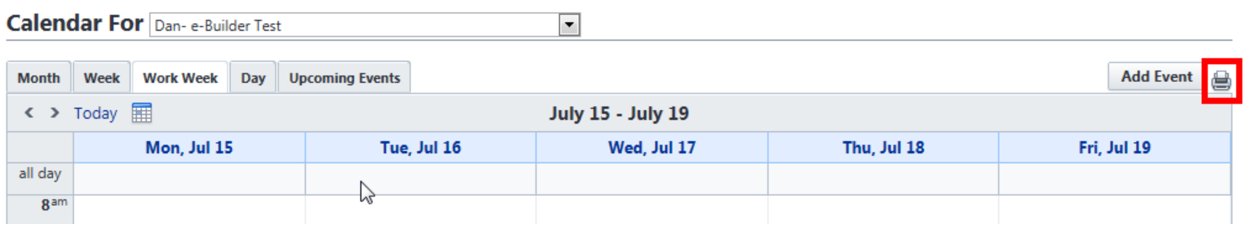
2. *To view by day, week, or month, click the appropriate tab (the default view is by work week).*



3. *To view a 30 day 'look ahead' of all events across all projects, click on the **Upcoming Events** tab.*



4. *To print within any view, click on **Print** link.*

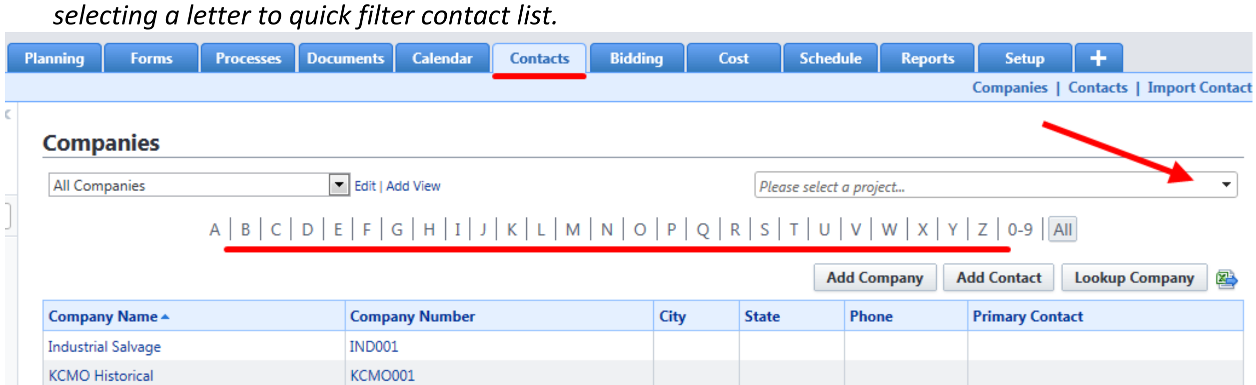


Contact Module

E-Builder's Contacts module provides a centralized directory of contacts for all of your projects. If you have any questions about the Contacts module or editing a contact, please consult with one of your Administrators for assistance.

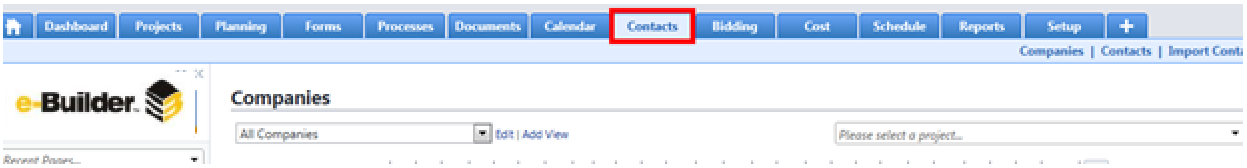
Viewing a Contact

1. *An e-Builder contact is a record of contact information for an individual (such as phone number, fax, e-mail address, street address, etc.) associated with an e-Builder Company. Contacts can be stored as a reference.*
2. *The user can view contacts according to a project (by using the project drop down menu) or by selecting a letter to quick filter contact list.*

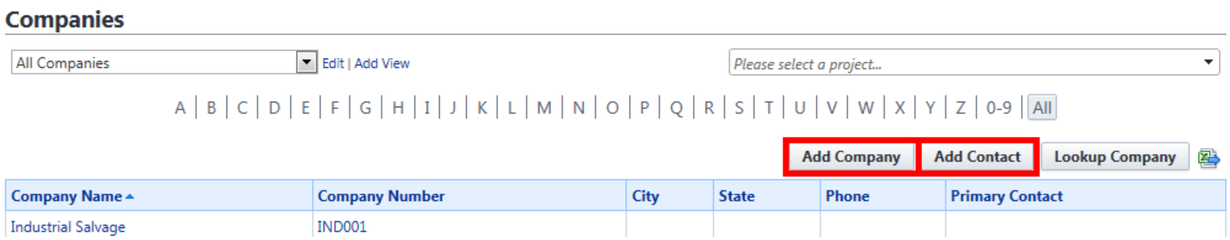


Adding a Company or Contact

1. *Click on the **Contacts** tab.*

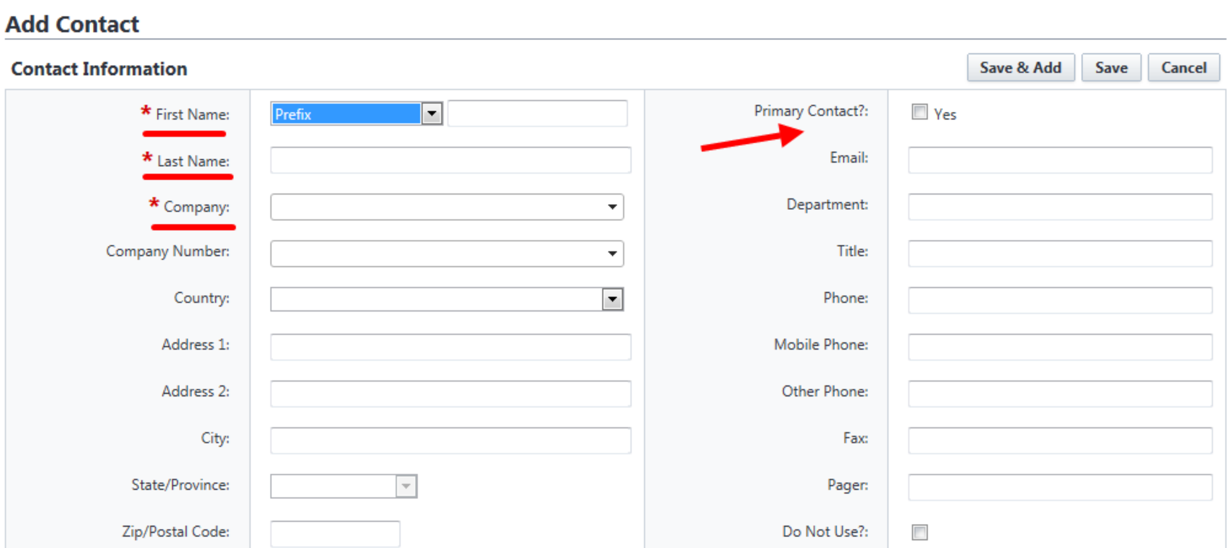


2. *On the right-side of the screen, click **Add Contact** or **Add Company**.*

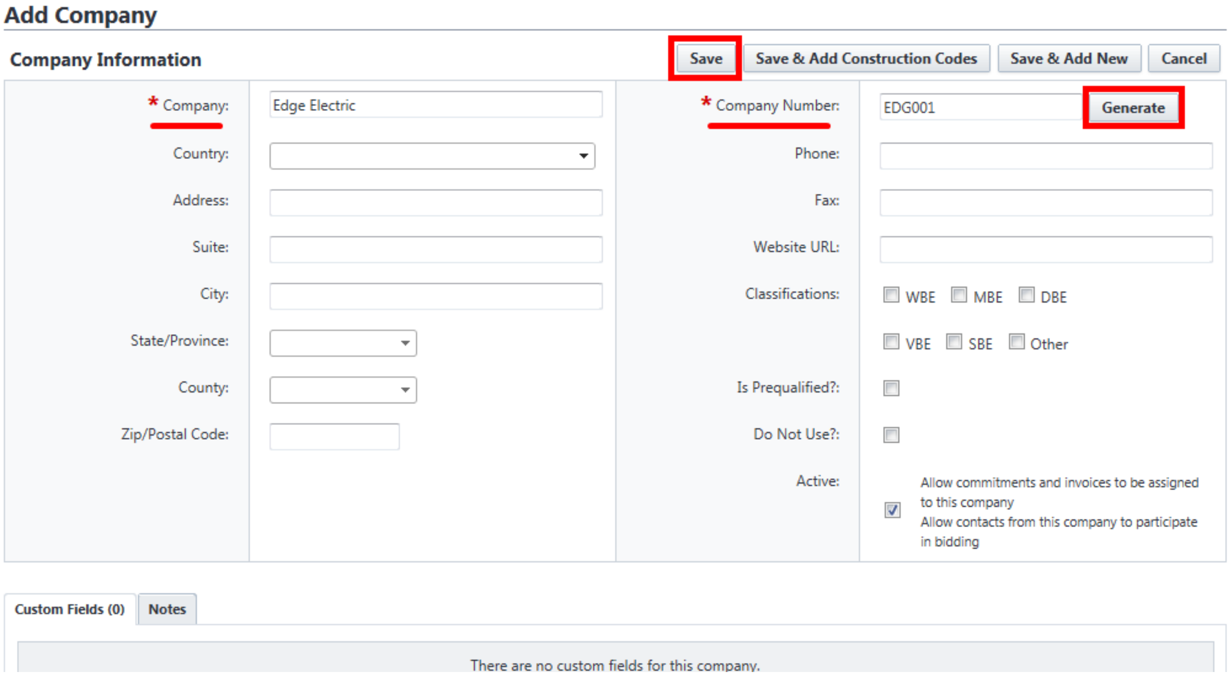


3. *Enter Contact or Company information and fill in any custom fields (required fields are indicated by red asterisk).*
4. *For a contact:*

- *If adding a company, check the appropriate box if the individual is the primary contact for the company. (If they are the only contact associated with the company then they are the primary contact by default.)*
- *Click **Save***



5. *For a Company:*
    - *Fill in required fields*
    - *If company does not have a company number, press Generate button to auto-generate one.*
    - *Click **Save***

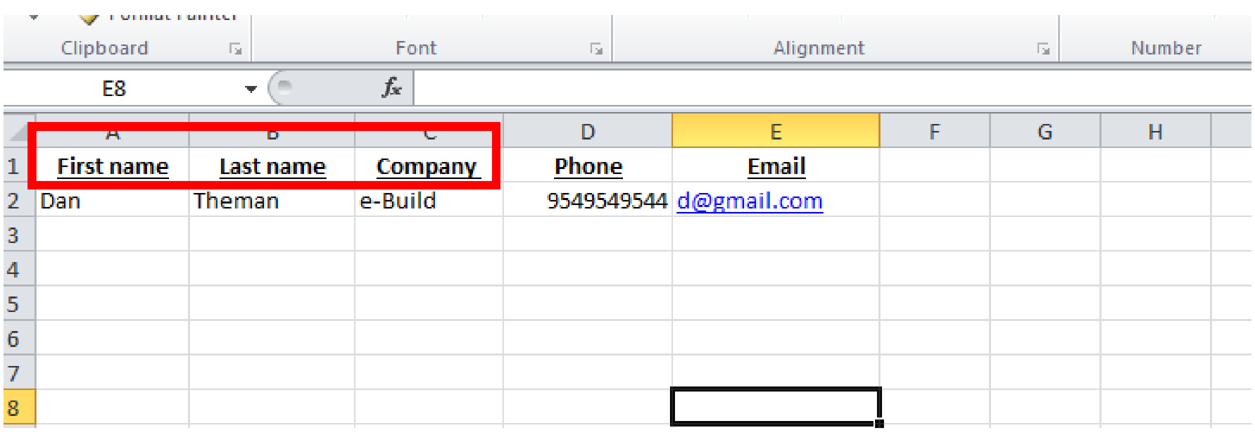


6. *Click **Save** (If you have more than one entry, click the **Save and Add** button and you will be able to add another contact or company.)*

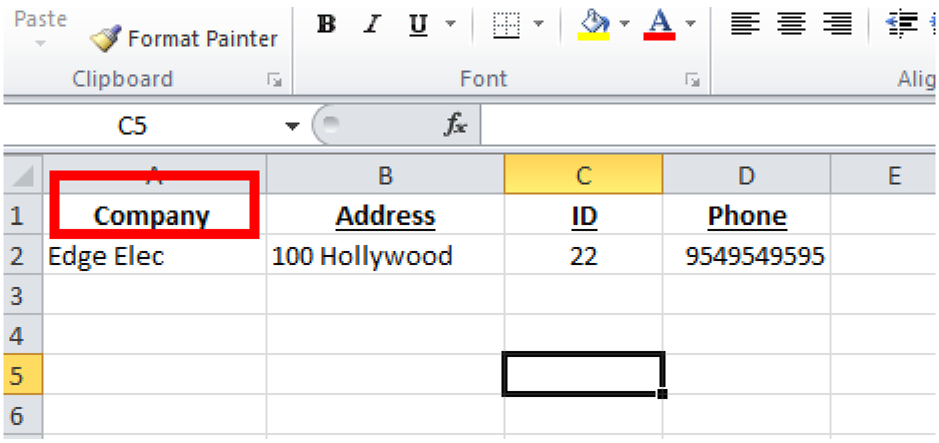
Importing Multiple Contact or Companies

If there are numerous companies or contacts such that adding them one at a time would be cumbersome, they can be imported directly from an Excel file which will add all rows in the spreadsheet as a company or a contact.

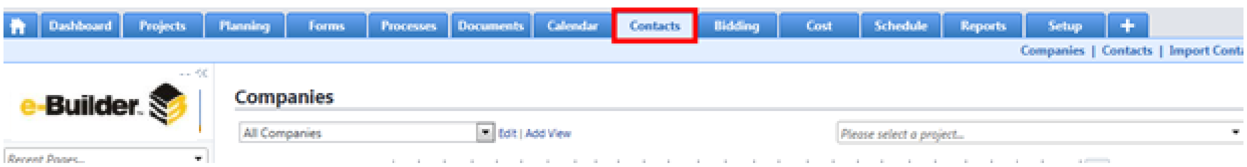
- For a Contact: Excel sheet must contain Company, First name, and Last name (Additional information is recommended but optional)



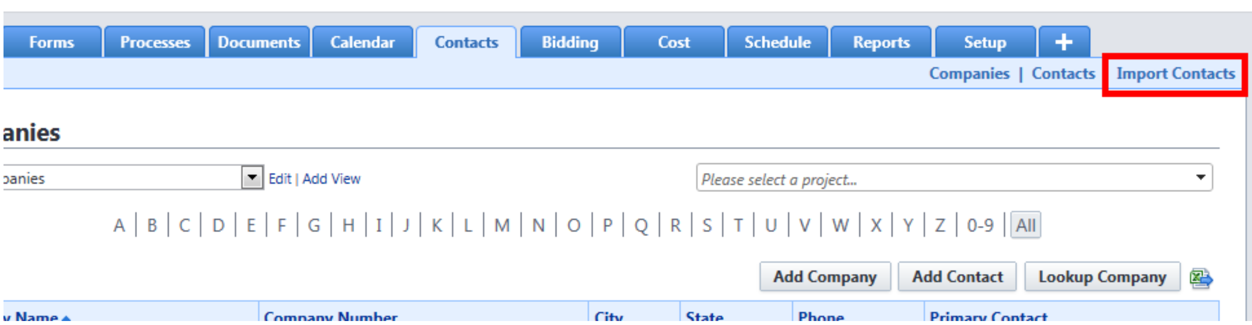
- For a Company: Excel sheet must contain Company Name (All other information is optional)



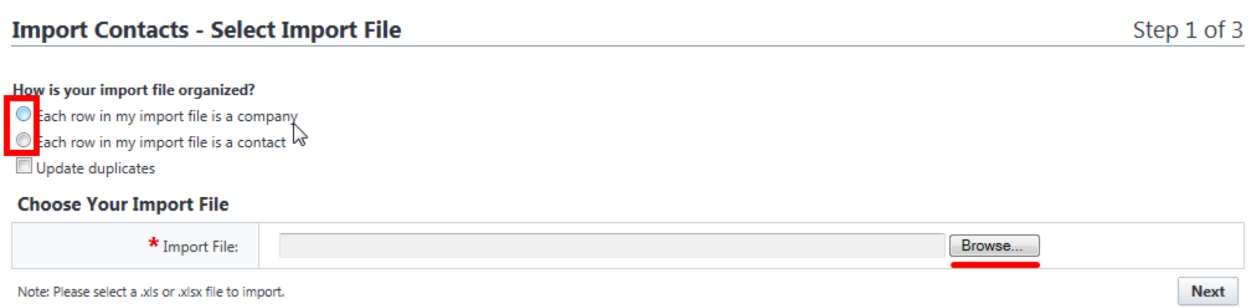
1. *Click on the **Contacts** tab at the top of the screen.*



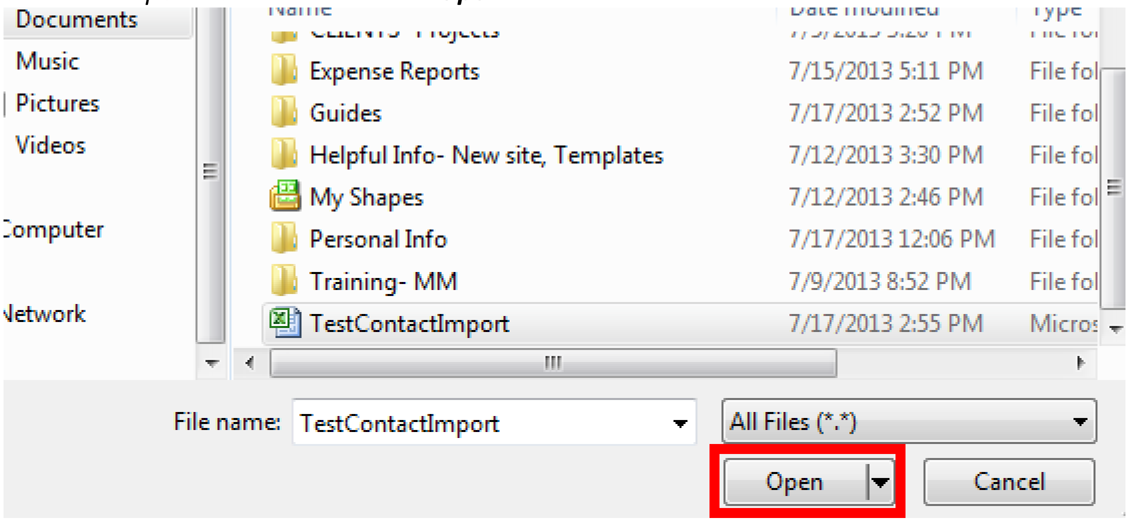
2. *Click on **Import Contacts** next to the Jump To menu on the top right of the window.*



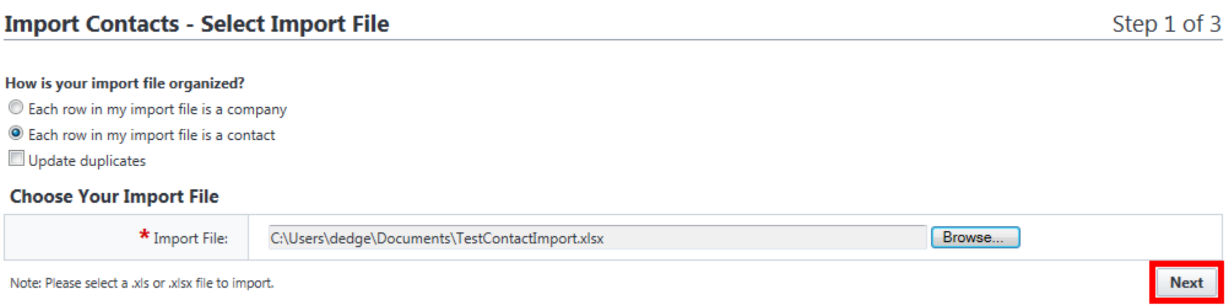
3. *Select **Import Contact**.*
4. *Select the option that corresponds to how your import file is organized either each row in my import file is a company or contact. (Check Update Duplicates if you would like to have pre-existing contacts updated by your excel file)*
5. *Click **Browse** to navigate to your file.*



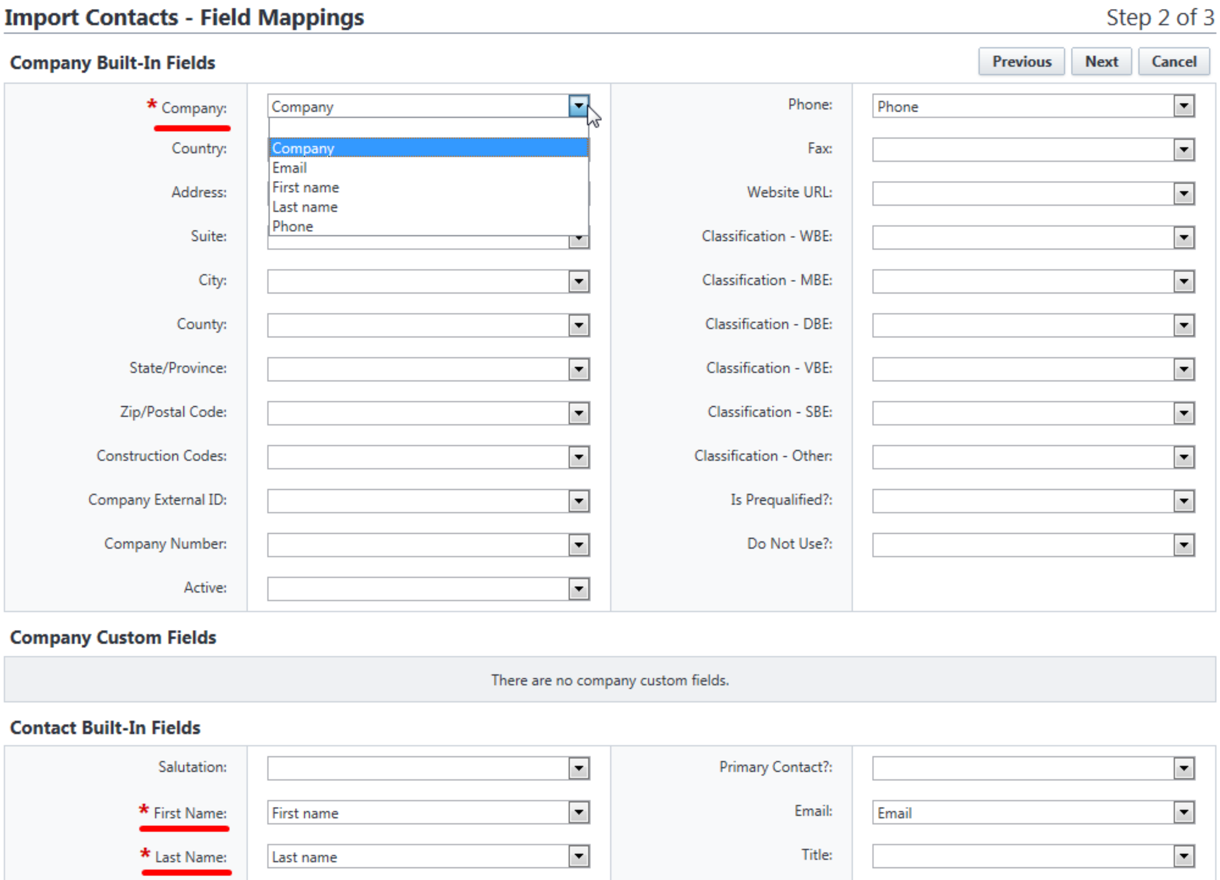
6. *Find Import document and click **Open**.*



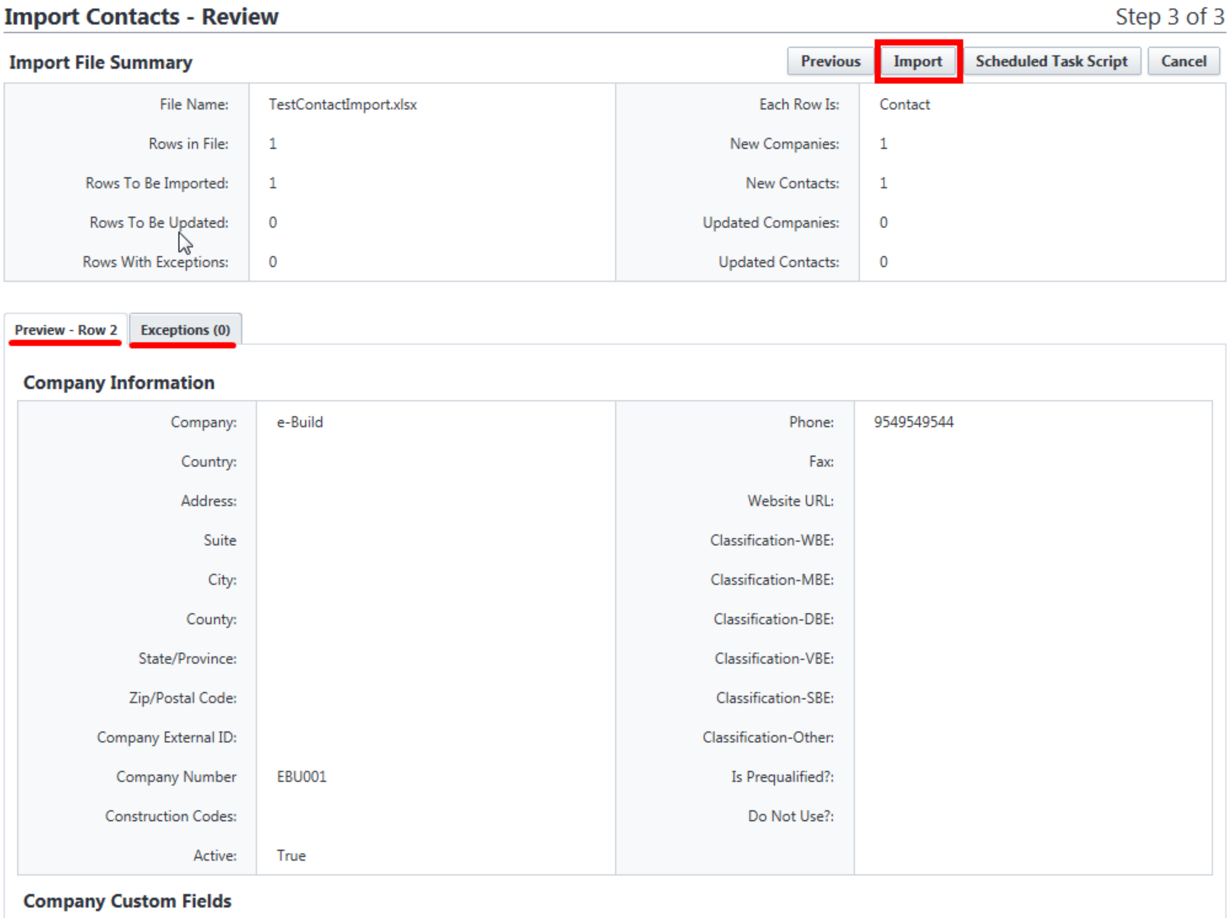
7. *Click **Next.***



8. *Map the fields in e-Builder to the fields in your import file. (Each drop-down box will display a list of Import File field names that will correspond to the columns in the Excel spreadsheet)*



9. *When all the fields are mapped, click **Next**. An Import Review screen will be displayed on which you can verify that all the fields are mapped correctly. In the middle of this screen are two tabs: The first is the Preview, and the second is the Exceptions. (If there are exceptions, this means that there is missing information for the company/contact which will need to be corrected in the MS Excel import file.)*



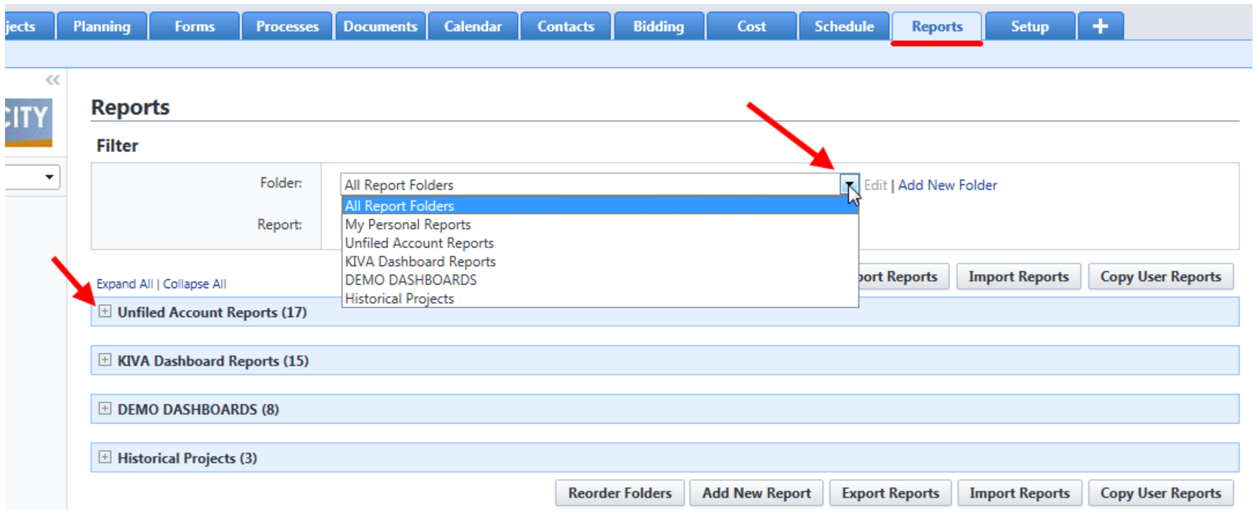
10. *Once the mappings are verified and exceptions are corrected in the import file, click **Import**.*

Note: If you do not have access to complete this function, consult your Account Administrator.

Report Module

The e-Builder Reports module allows you to view reports on all aspects of your projects in e-Builder. Reports are lists, summaries, and analyses of your data, which you can display or print. The module enables any e-Builder user to easily report on real time, up-to-date information recorded in any of the e-Builder modules that users have access to.

1. *Click on the **Reports** tab.*
2. *To view the contents of a single folder, click on the drop-down list in the middle of the screen and select the name of the desired folder. You can also access report folders by clicking the expand button next to the name.*

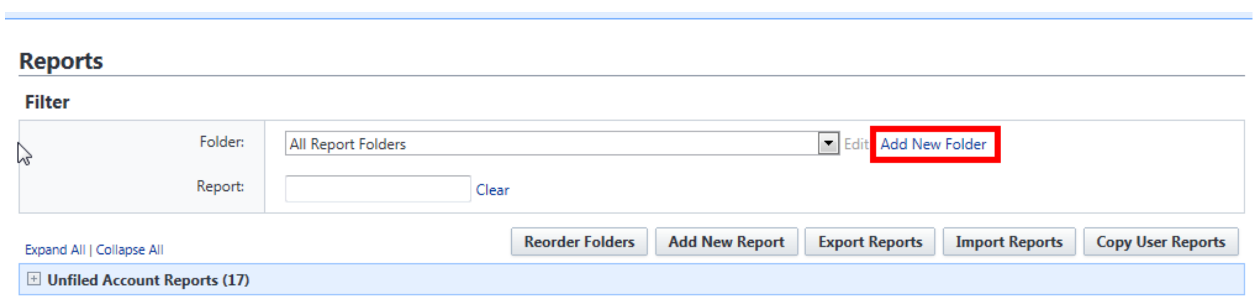


Organizing your Reports

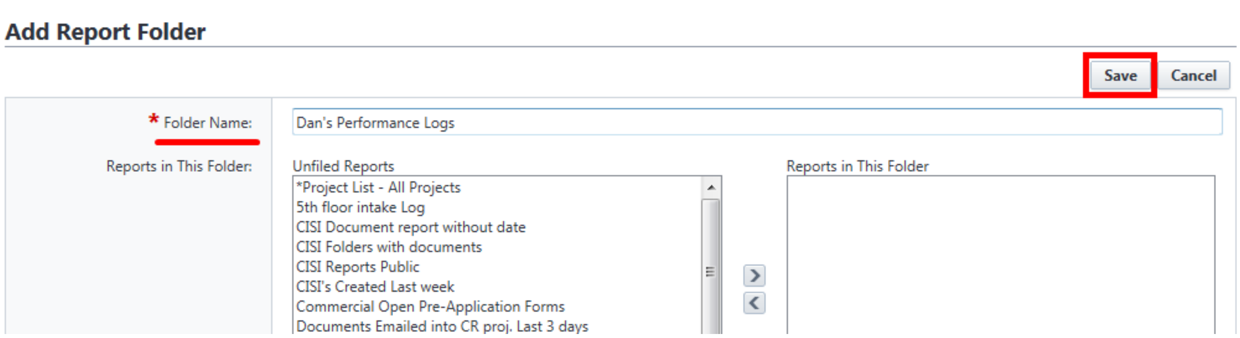
Each report saved is stored in a report folder, which is used to separate the reports into functional categories.

Creating a Report Folder

1. *From the Reports Tab, click the **Add New Folder** link.*

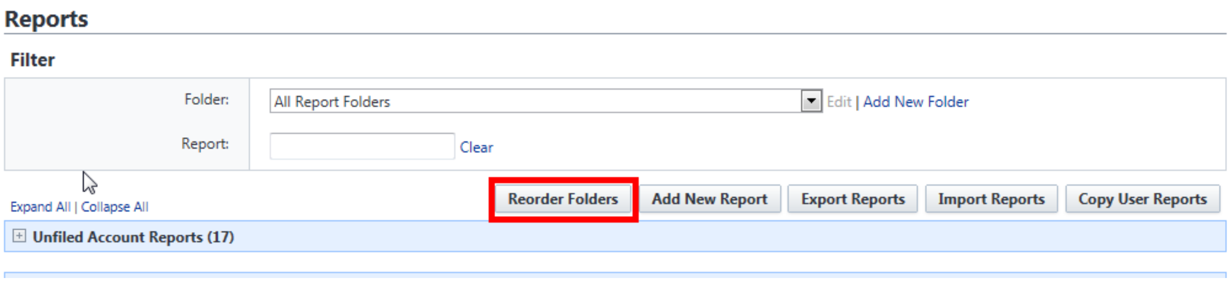


2. *Enter a name for the new report folder. Click **Save.***

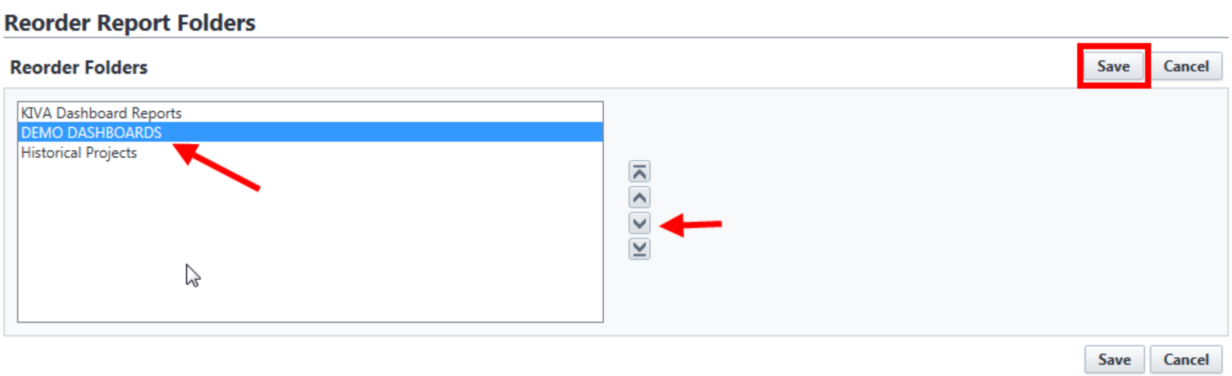


Reordering Report Folders

To change the order in which are reports are displayed, Click **Reorder Folders**.



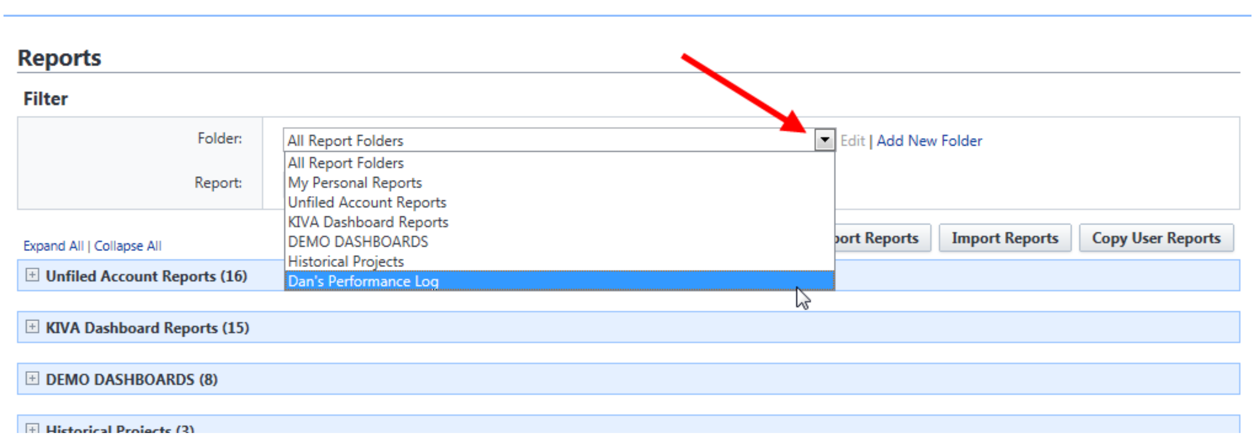
1. *Click on the name of a report folder.*
2. *Click the Top, Up, Down, or Bottom button to change the order in which they are listed, if desired.*



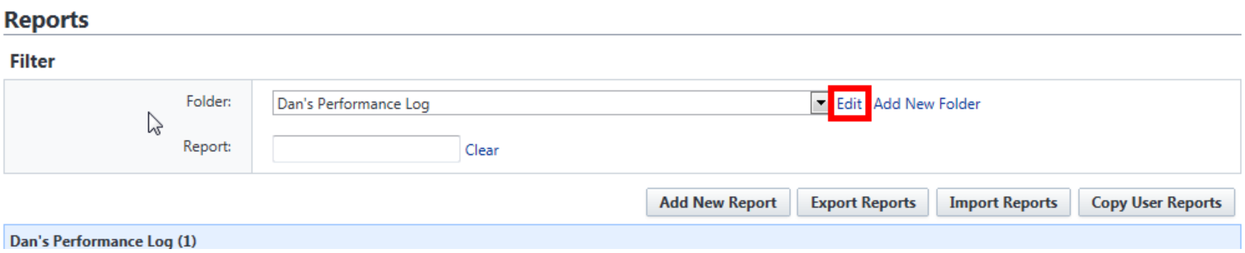
3. *When finished, click **Save**.*

Editing/Deleting a Folder

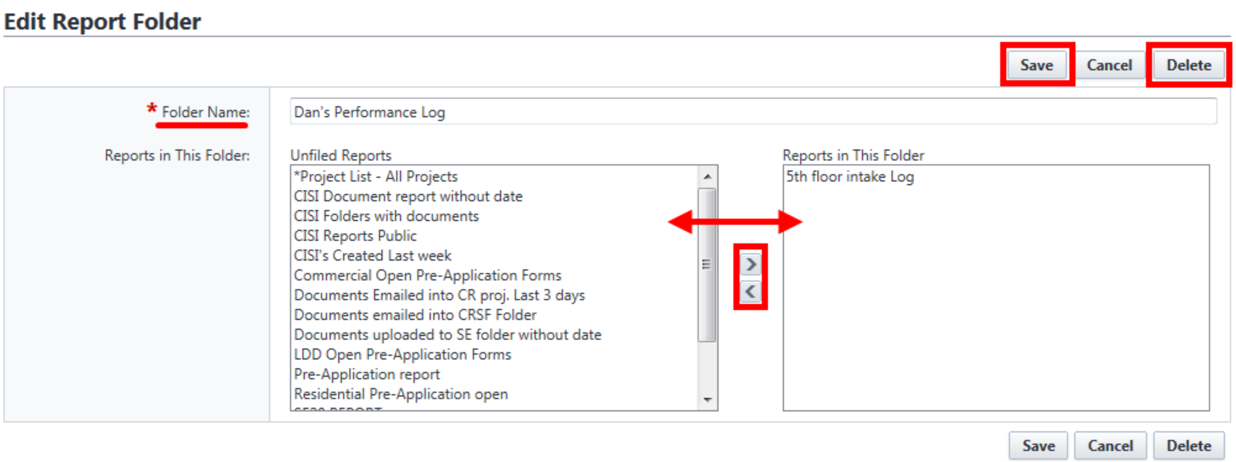
1. *Select the folder name in the drop-down.*



2. *Click the **Edit** link located to the right off the folder name. On the Edit Report Folder screen you can:*



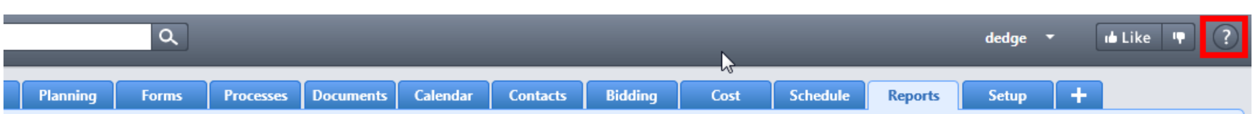
- *Edit the Folder Name.*
- *Move Reports to or from the Unfiled Reports folder by choosing the report name and using the Add/Remove arrows*
- *Delete the Folder by clicking the delete tab. A confirmation dialog box will be displayed asking you to confirm your selection. Click **Yes, Delete the Report Folder** button.*



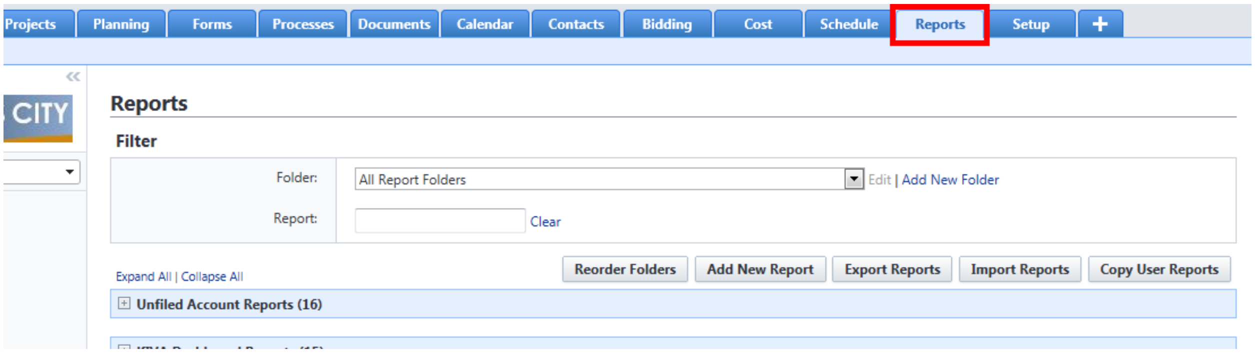
3. *Click **Save**.*

Creating a New Report

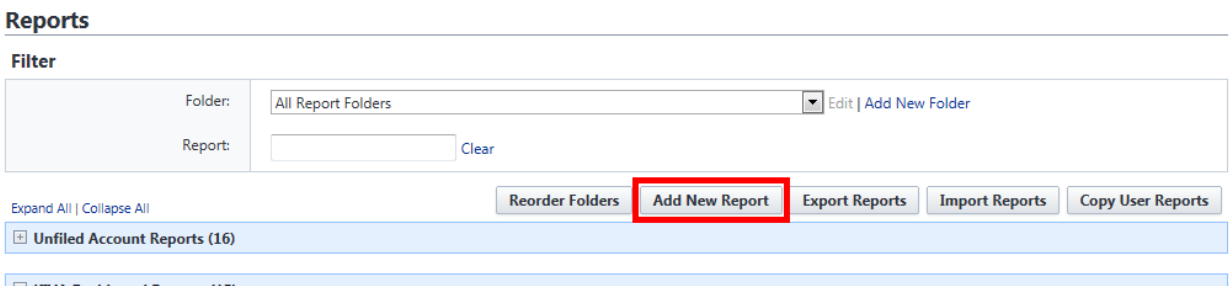
Users can create their own reports by using the Report Wizard, which is a series of screens that walks you through creating a customized report that displays only the information you need. As you complete each step, click **Next**. You can click the **Previous** button to go back to the previous step or use the 'Jump to step' drop-down menu to skip steps. (Don't forget to use the Help (?) in the top right corner of the screen for any questions!)



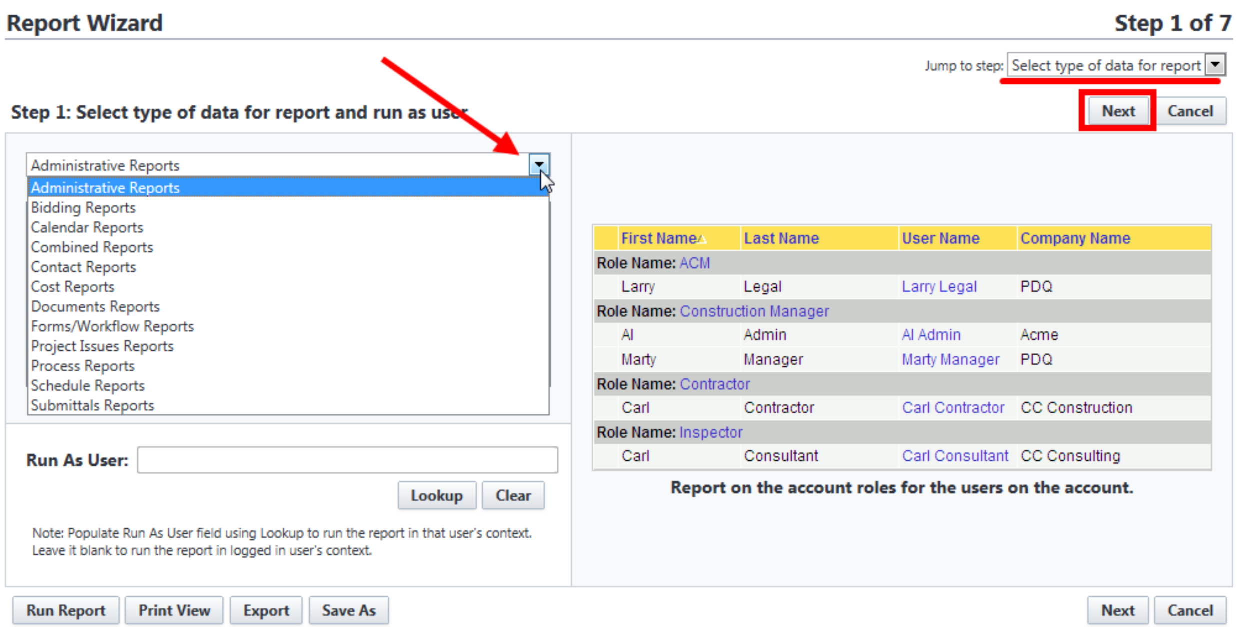
1. *Click on the **Reports** tab at the top of the screen.*



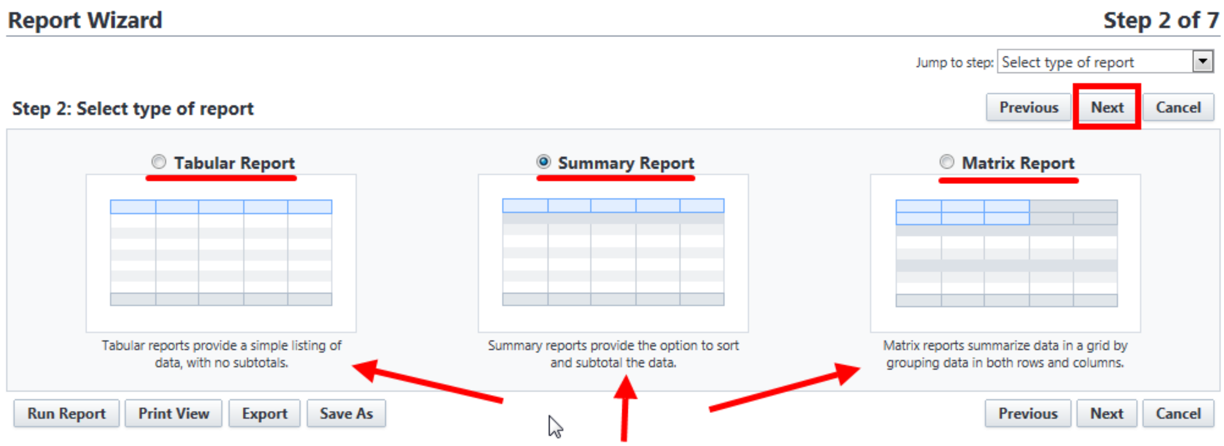
2. *Click on the **Add New Report** button. You will be directed to the Report wizard.*



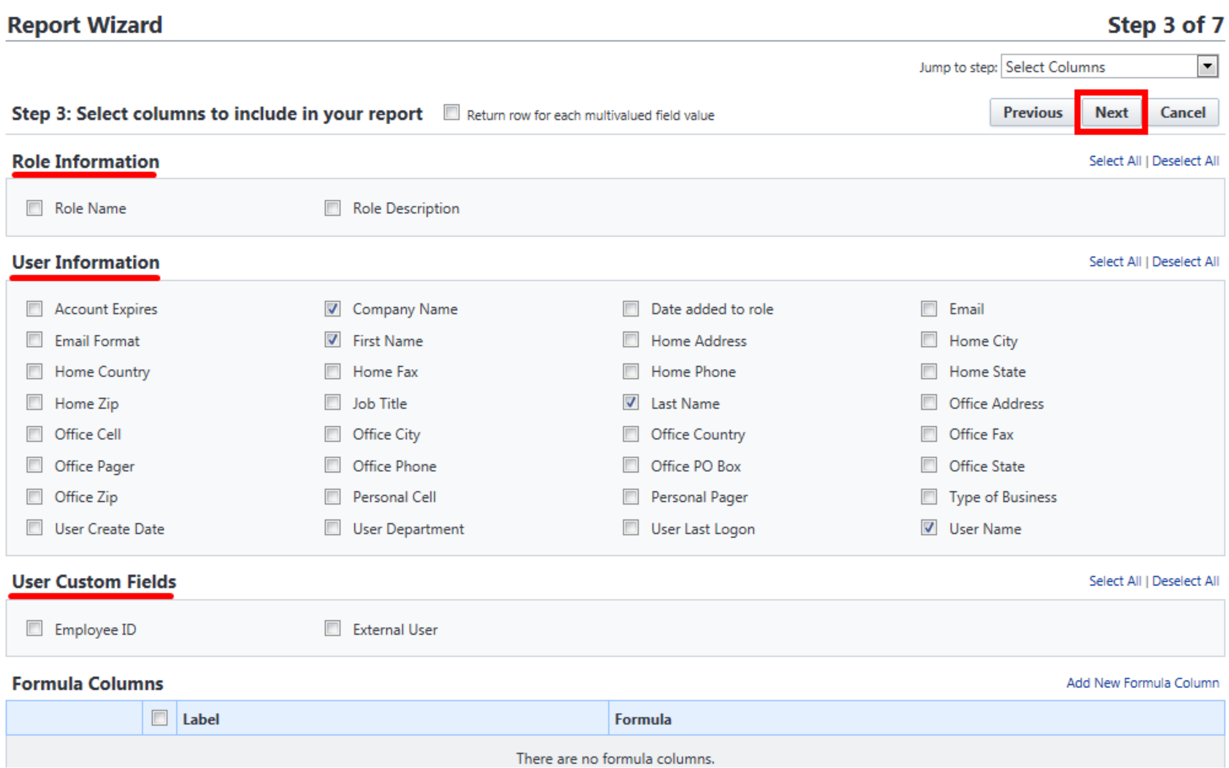
3. *In Step 1, click the drop-down menu and select the type of data that will be used to run the report, click the **Next** button.*



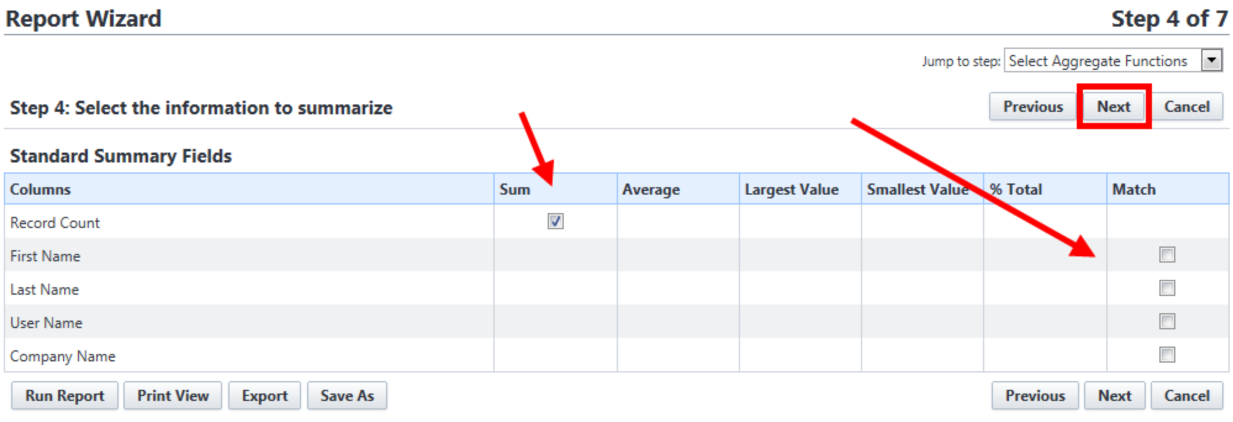
4. *In Step 2, click on the radio button for the type of report you wish to run. (Descriptions of each type are beneath the pictures) Click **Next**.*



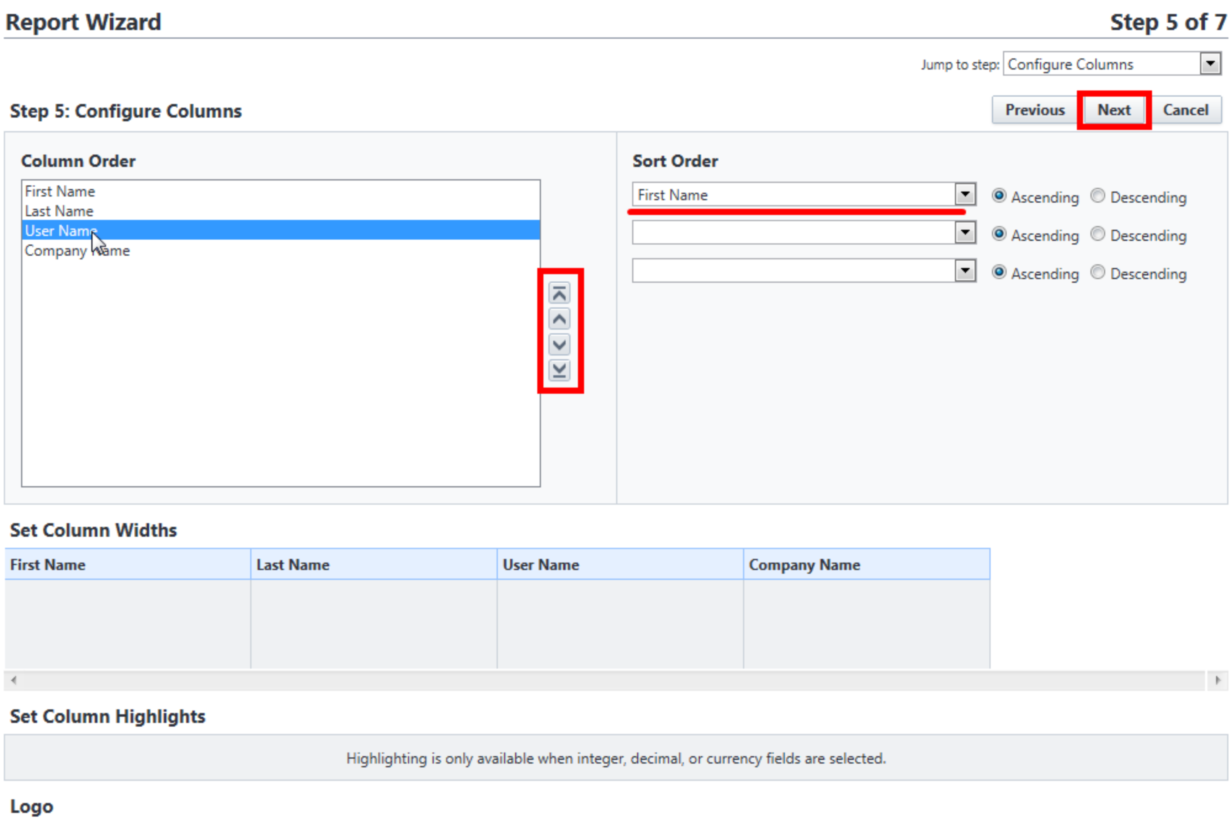
5. *In Step 3, select the columns to be included in the report by placing a check mark next to the column name. Click **Next**.*



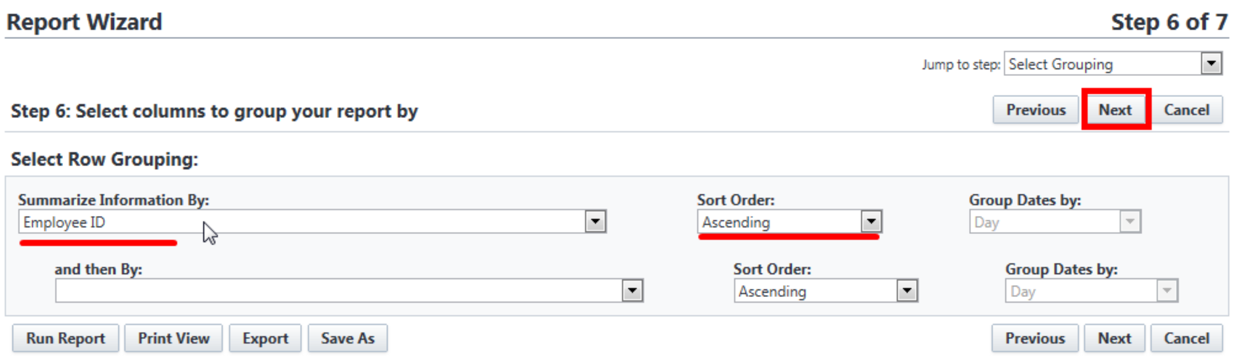
6. *In Step 4, select the aggregate functions to be included in the report. Click **Next**.*



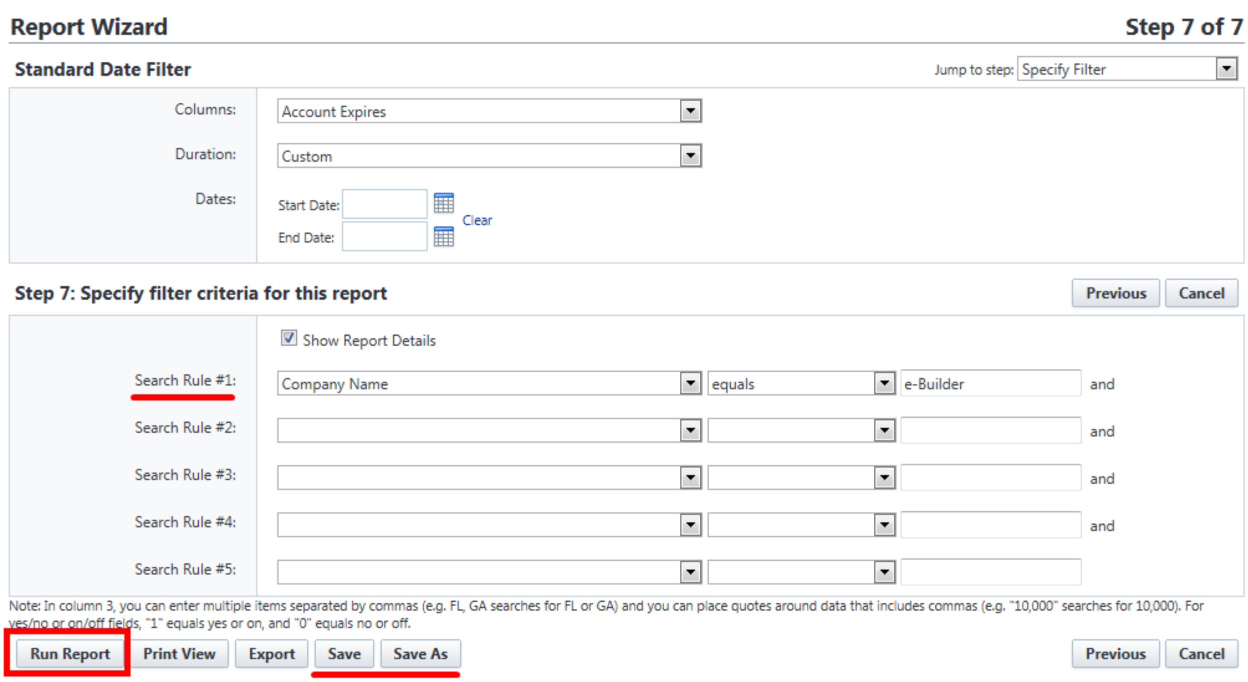
7. *In Step 5, choose the ordering of the columns by using the Top, Up, Down, and Bottom buttons.*



8. *If you have chosen a summary or matrix report, select grouping in Step 6 (optional) and click **Next**.*



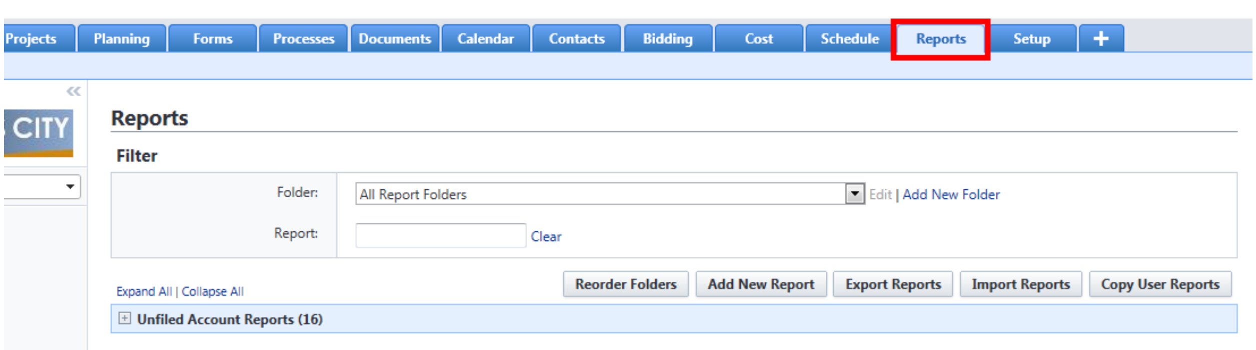
9. *In Step 7, specify filter criteria for the report.*



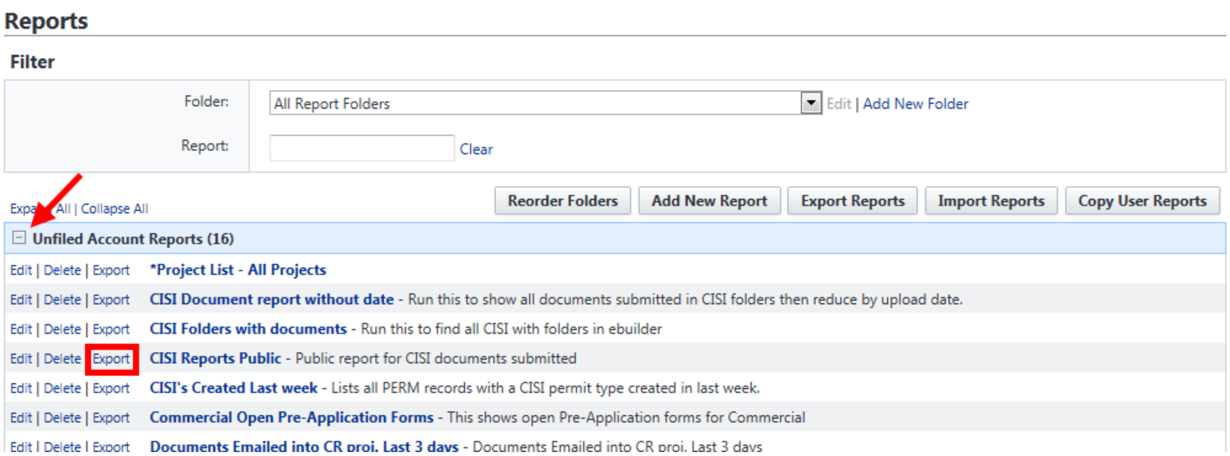
10. *Click **Save As** and enter a name and description for your report.*
11. *Click **Save**.*

Exporting a Report

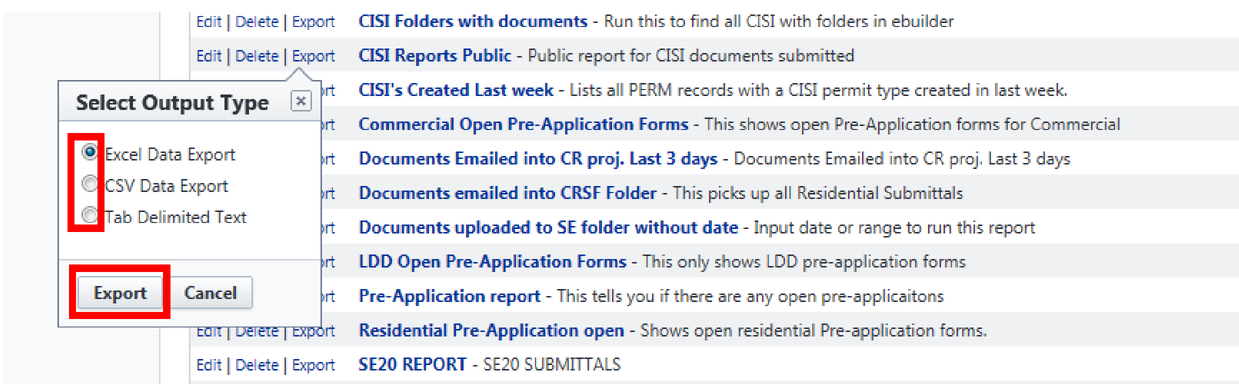
1. *Click on the **Reports** tab at the top of the screen.*



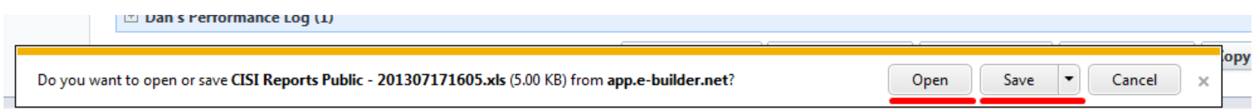
2. *Expand folder to display desired reports and click **Export** to the right of report.*



3. *Choose the type of file to export the report as and click **Export.***

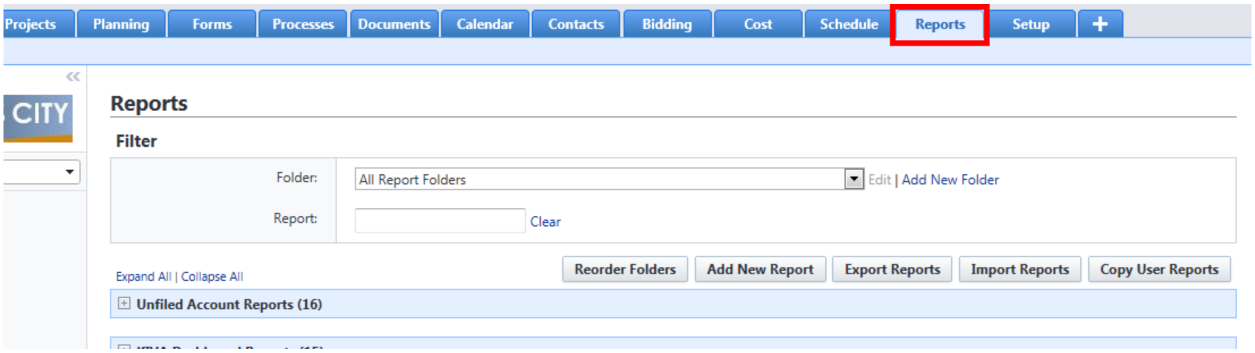


4. *Select **Open** to view in Excel or **Save** to save the file onto your computer.*

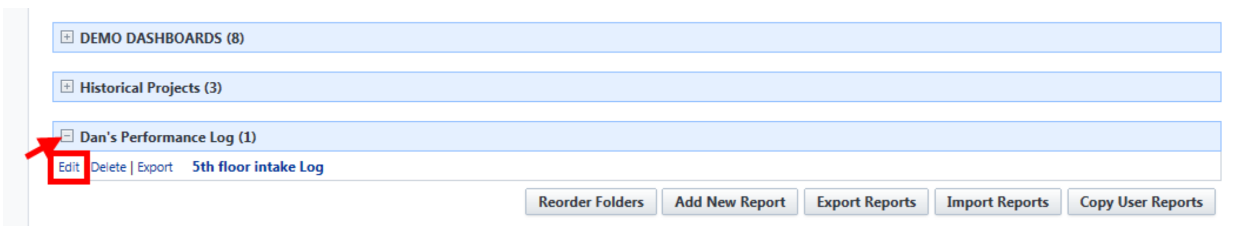


Editing an Existing Report

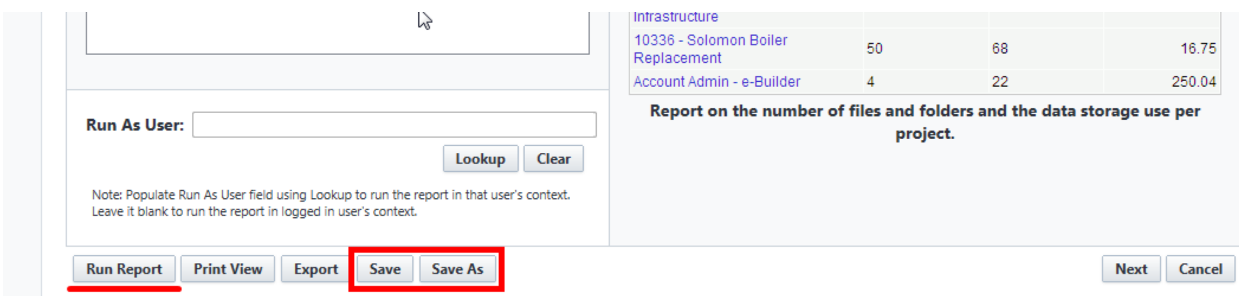
1. *Click on the **Reports** tab at the top of the screen.*



2. *Click on **Edit** next to the name of the report.*

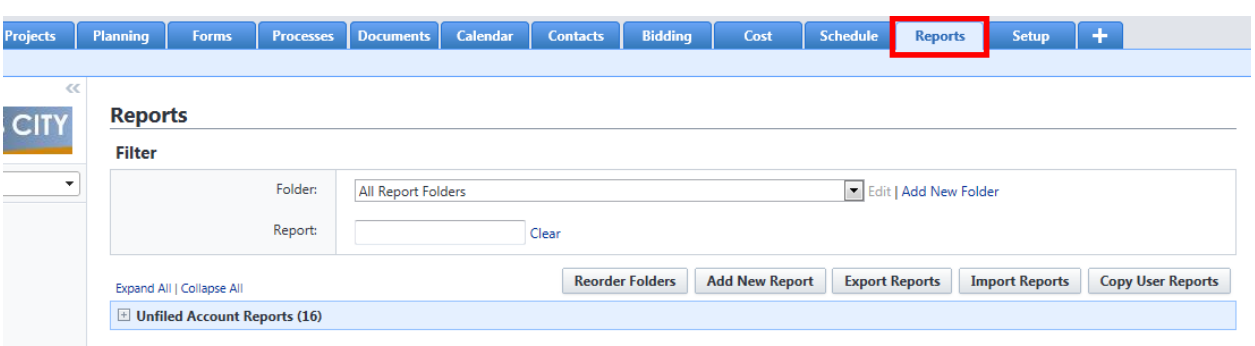


3. *Modify any aspect of the report within the Report Wizard. (See Creating a New Report, above, for more information if necessary)*
4. *Click the **Save** or **Save As** (to rename) button .*

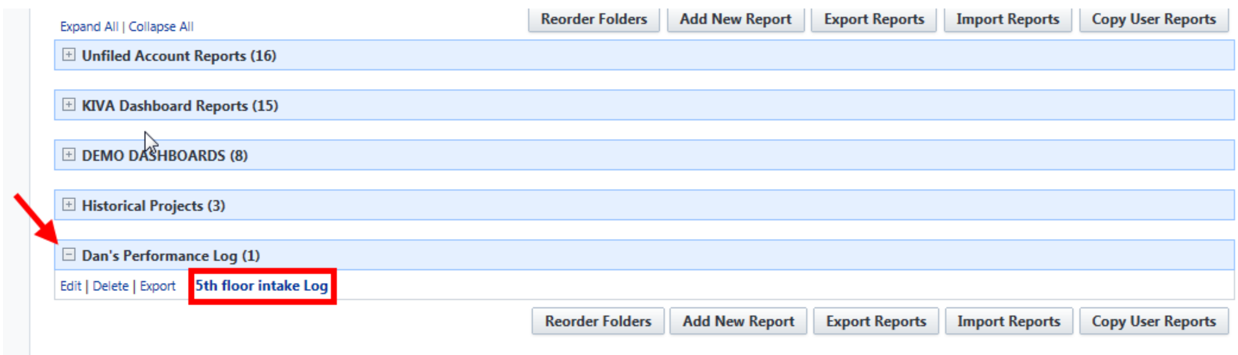


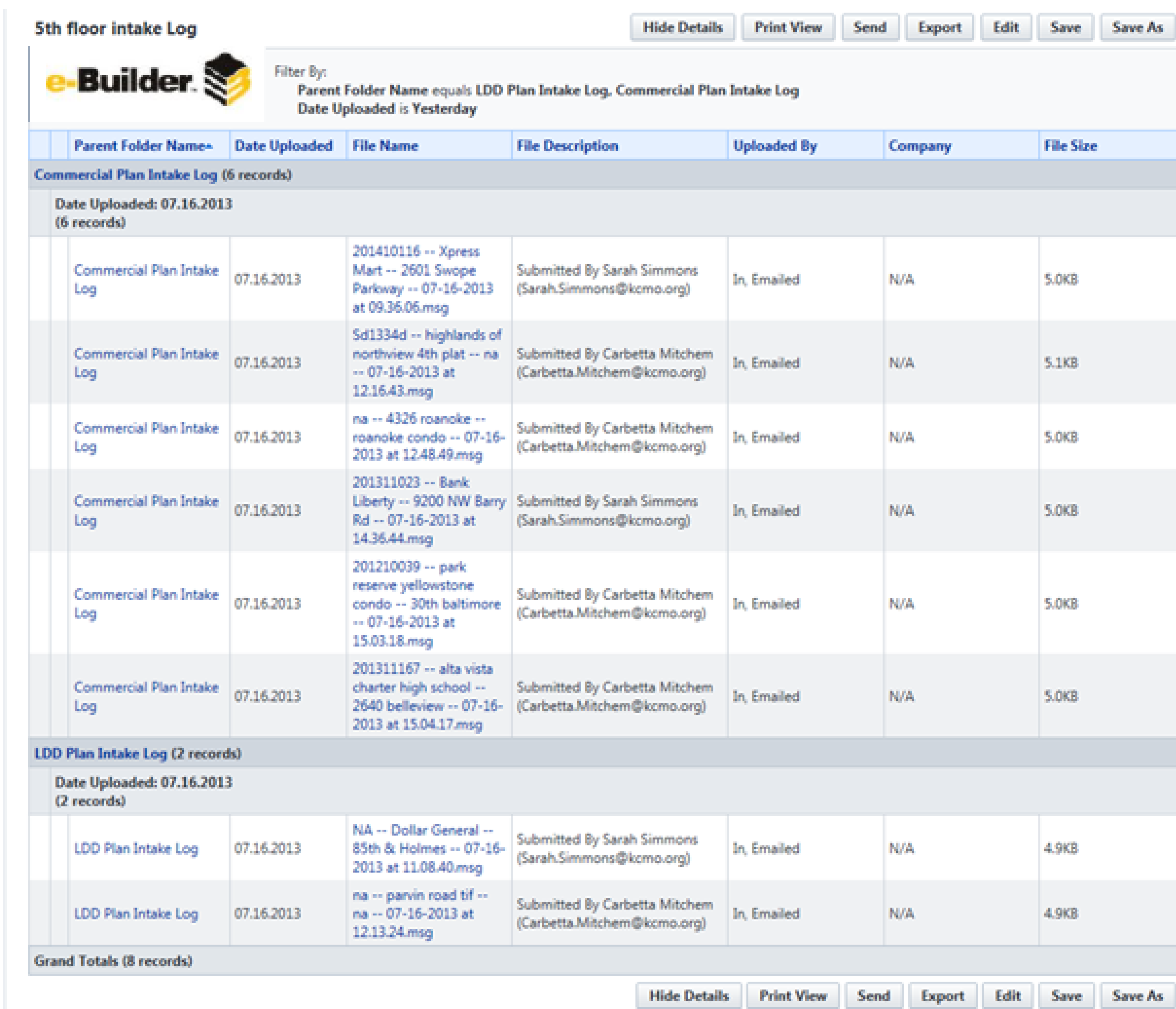
Running Reports

1. *Click on the **reports** tab at the top of the screen.*



2. *Click on the name of the report that you wish to run. The results of the report will be displayed on the screen.*





5th floor intake Log

Hide Details | Print View | Send | Export | Edit | Save | Save As

Filter By:
Parent Folder Name equals LDD Plan Intake Log, Commercial Plan Intake Log
Date Uploaded is Yesterday

Parent Folder Name	Date Uploaded	File Name	File Description	Uploaded By	Company	File Size
Commercial Plan Intake Log (6 records)						
Date Uploaded: 07.16.2013 (6 records)						
Commercial Plan Intake Log	07.16.2013	201410116 -- Xpress Mart -- 2601 Swope Parkway -- 07-16-2013 at 09.36.06.msg	Submitted By Sarah Simmons (Sarah.Simmons@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	Sd1334d -- highlands of northview 4th plat -- na -- 07-16-2013 at 12.16.43.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.1KB
Commercial Plan Intake Log	07.16.2013	na -- 4326 roanoke -- roanoke condo -- 07-16-2013 at 12.48.49.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	201311023 -- Bank Liberty -- 9200 NW Barry Rd -- 07-16-2013 at 14.36.44.msg	Submitted By Sarah Simmons (Sarah.Simmons@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	201210039 -- park reserve yellowstone condo -- 30th baltimore -- 07-16-2013 at 15.03.18.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	201311167 -- alta vista charter high school -- 2640 belleview -- 07-16-2013 at 15.04.17.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.0KB
LDD Plan Intake Log (2 records)						
Date Uploaded: 07.16.2013 (2 records)						
LDD Plan Intake Log	07.16.2013	NA -- Dollar General -- 85th & Holmes -- 07-16-2013 at 11.08.40.msg	Submitted By Sarah Simmons (Sarah.Simmons@kcmo.org)	In, Emailed	N/A	4.9KB
LDD Plan Intake Log	07.16.2013	na -- parvin road tif -- na -- 07-16-2013 at 12.13.24.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	4.9KB
Grand Totals (8 records)						

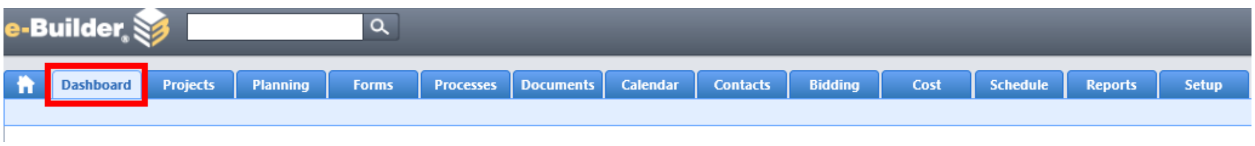
Hide Details | Print View | Send | Export | Edit | Save | Save As

Dashboard Module

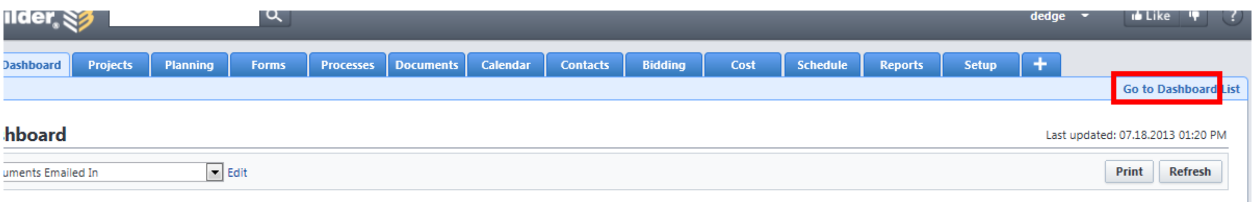
Dashboards are graphical representation of reports that present summary data in a visual format. They are typically used to provide overviews of program or project status and metrics. Dashboards are dependent on the information contained within the reports.

Creating a Dashboard

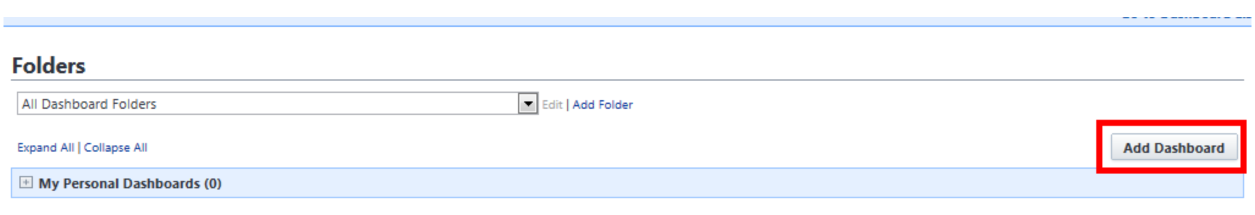
1. *Click the **Dashboard** tab at the top of the page.*



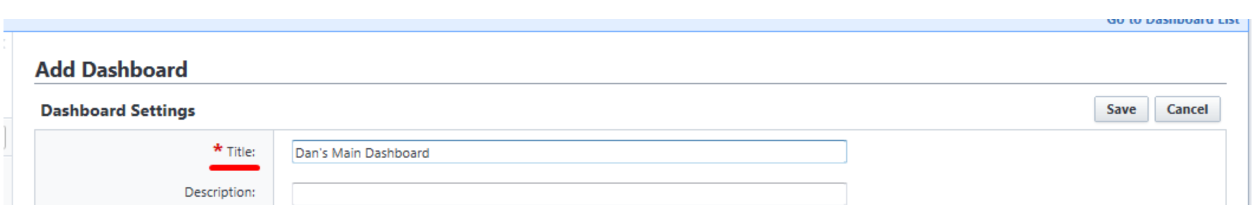
2. *Select the **Go To Dashboard List** link, to the right of View Dashboard.*



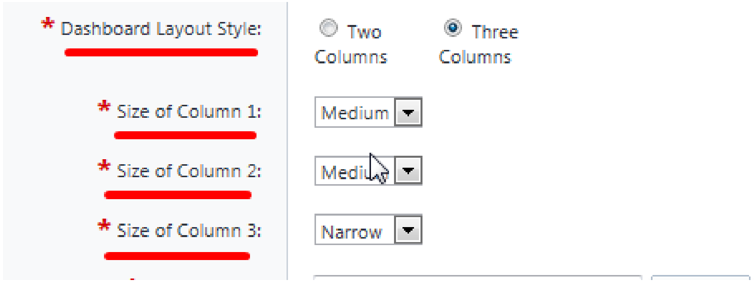
3. *Click the **Add Dashboard** button.*



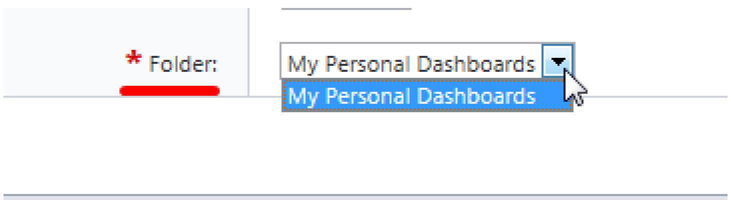
4. *Type a Title for the dashboard.*



5. *Select the Layout Style: Two or Three columns. Select column width: Narrow, Medium, Wide, or Custom.*



6. *Select the folder to store the dashboard in.*



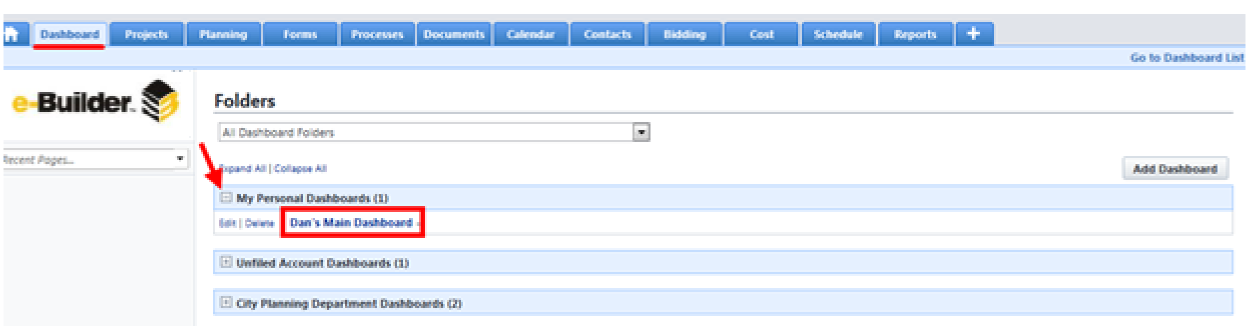
7. *Click the **Save** button.*

Dashboard Items

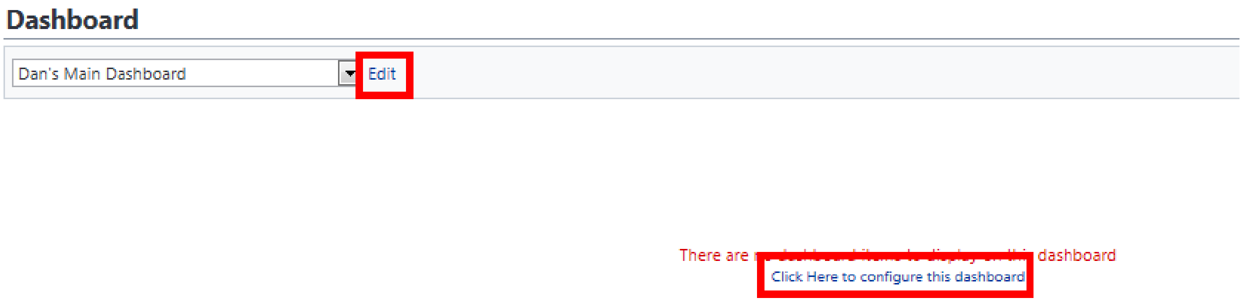
Once you have created your Dashboard, you have to add items to it. Dashboard items are the individual graphs that summarize the data.

To add a dashboard item:

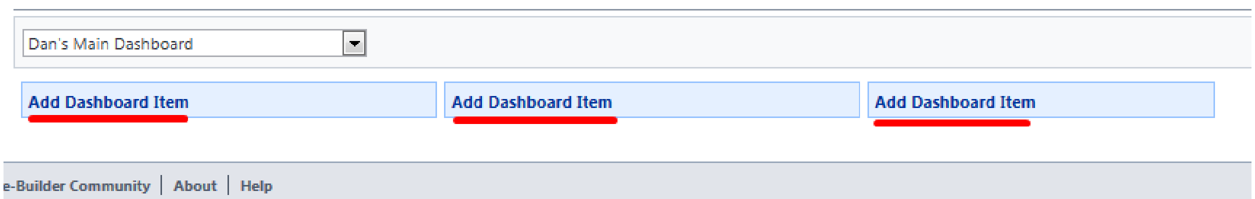
1. *Select the name of the Dashboard.*



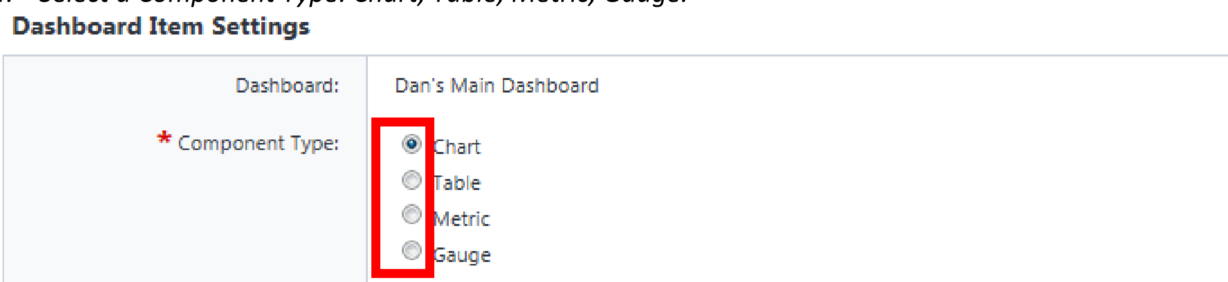
2. *Click the **Edit** link or the **Click here to configure this dashboard** link.*



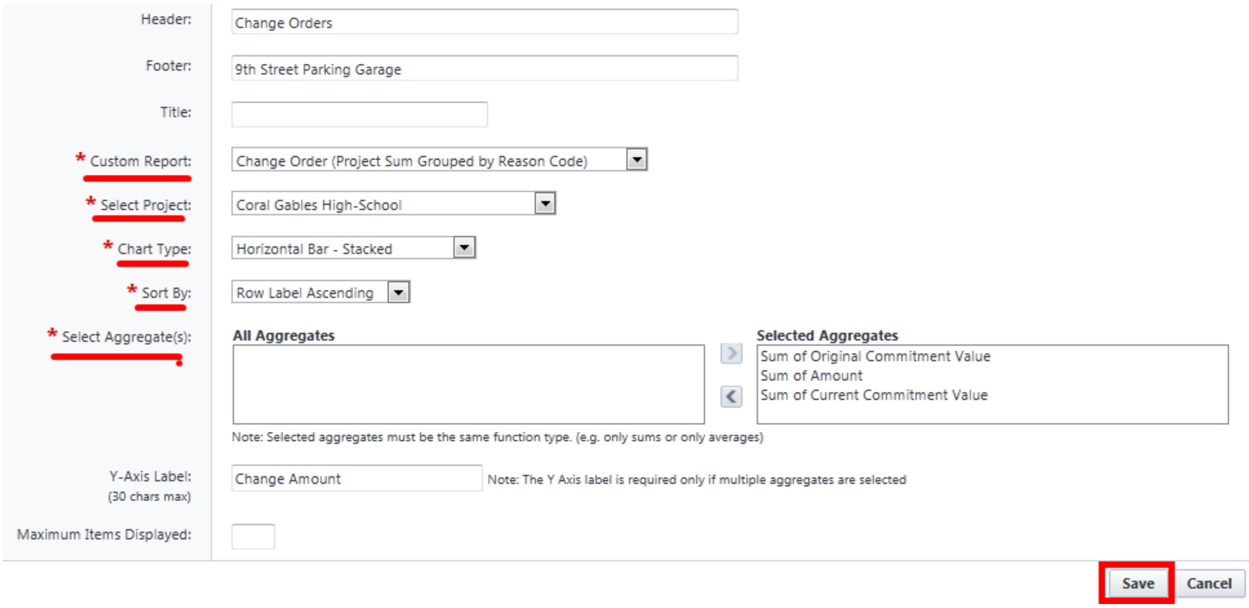
3. *Click the **Add Dashboard Item** for the column in which the dashboard should be displayed.*

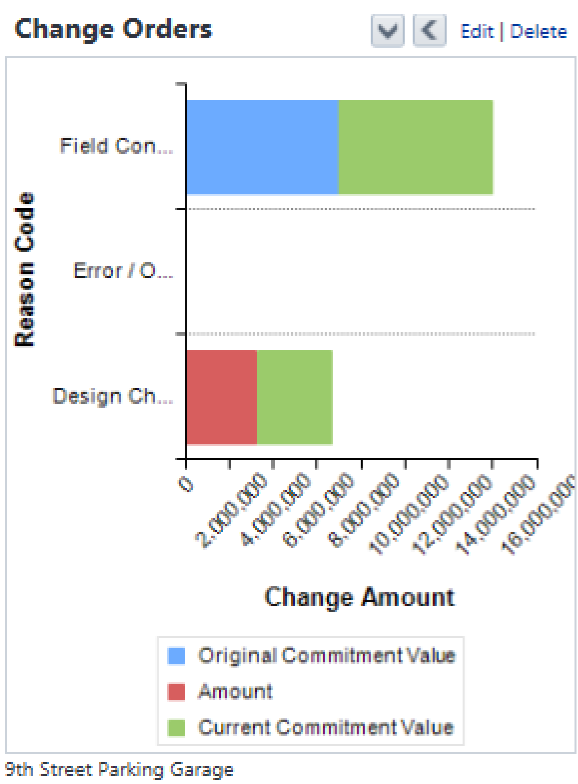


4. *Select a Component Type: Chart, Table, Metric, Gauge.*

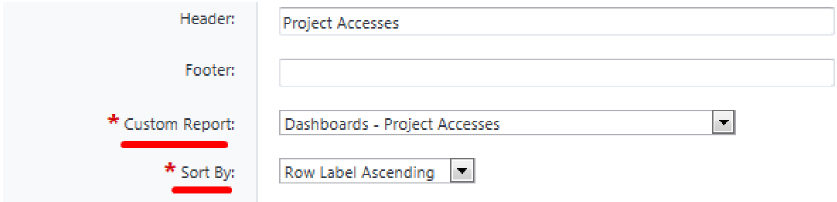


5. *For Chart:*
   - *Select Report, Chart Type, and Sort By (Other fields are optional)*
   - *Click **Save***





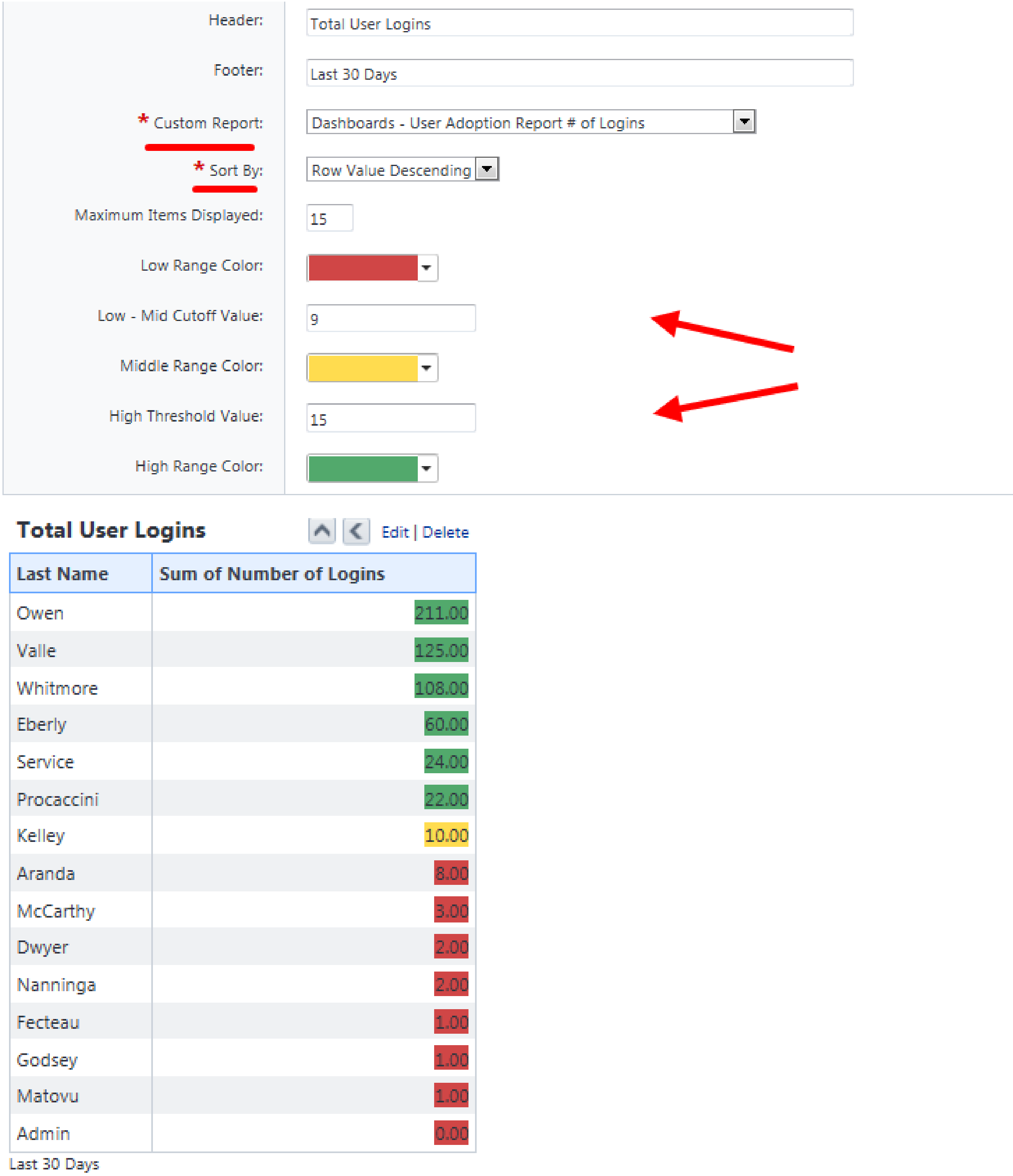
6. *For Table*
   - *Select Report and Sort By*
   - *Click Save*



Project Accesses Edit | Delete

Project Name	Sum of Project Accesses
Adams University Classroom Renovation	177.00
Anderson School Building Renovations	100.00
APWA Renovation	25.00
Baptist Hospital Cath Lab Remodel	122.00
Beamont Waterway	81.00
Boulder Baptist Hospital	89.00
Brandon Park, Downtown Denver	57.00
Campbell Cancer Research	265.00
Central Plant Roof Replacement	47.00
Clarke Testing Center	16.00
Claude Moore	173.00

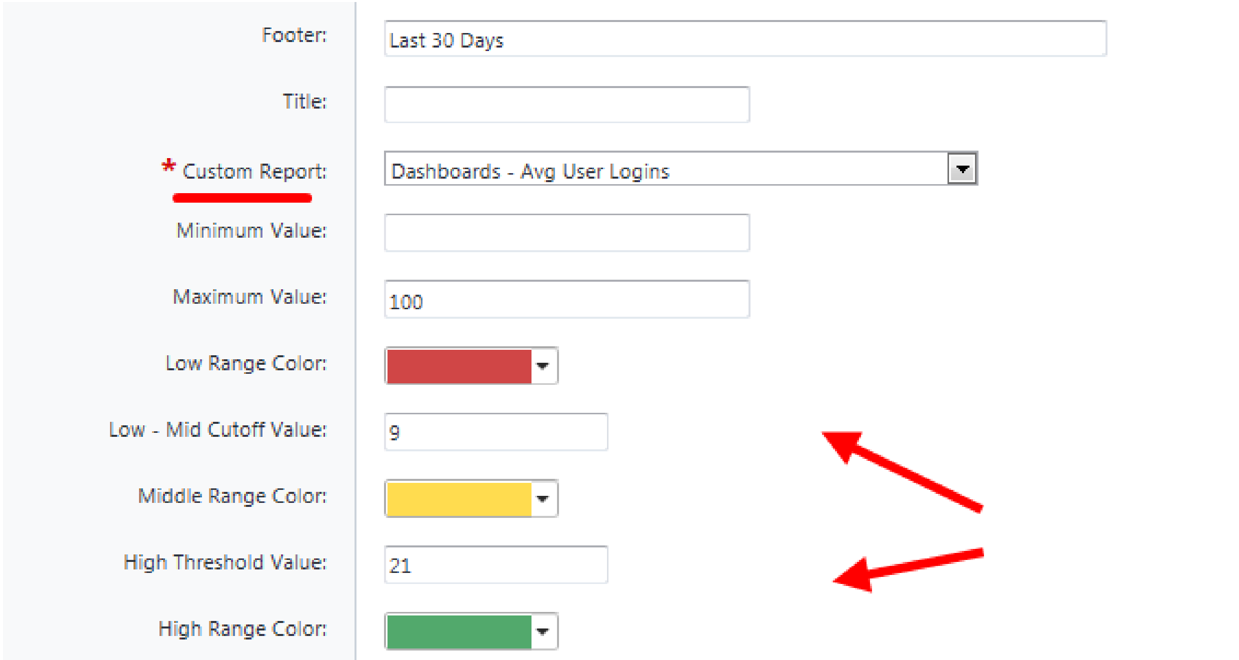
7. *For Metric:*
   - *Select Report, Sort By, Range Numbers & Colors*
   - *Click **Save***

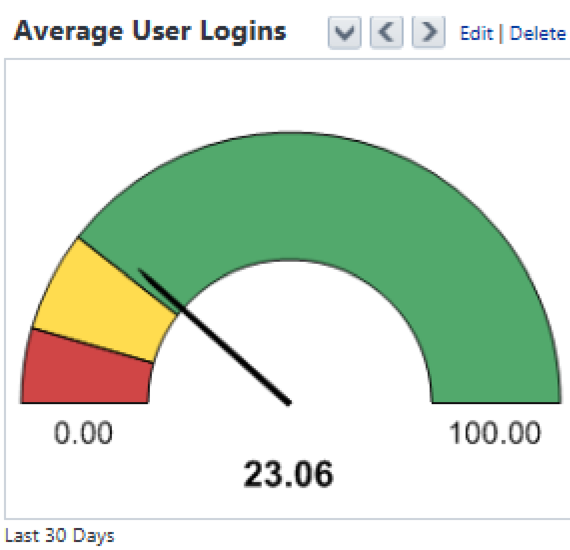


Last Name	Sum of Number of Logins
Owen	211.00
Valle	125.00
Whitmore	108.00
Eberly	60.00
Service	24.00
Procaccini	22.00
Kelley	10.00
Aranda	8.00
McCarthy	3.00
Dwyer	2.00
Nanninga	2.00
Fecteau	1.00
Godsey	1.00
Matovu	1.00
Admin	0.00

Last 30 Days

8. *For Gauge:*
   - *Select Report, Range Colors, and Cutoff Values*
   - *Click **Save***

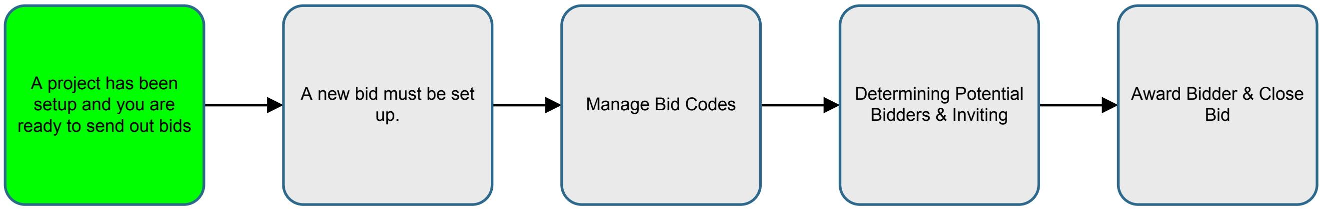




Note: Dashboards are based on summary and matrix reports. The values are determined by groupings.

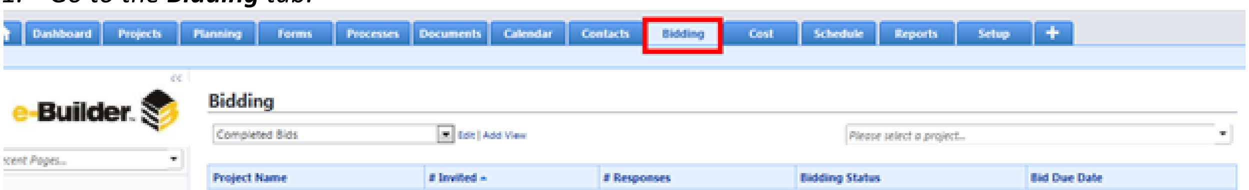
Bidding Module

The e-Builder Bidding Module provides the ability to manage your project bids to non-licensed users. The bids will be sent from e-Builder via email or fax based on the bidders' preference. Certain key elements of the bid process can be configured to assist in the notification and tracking of bids.

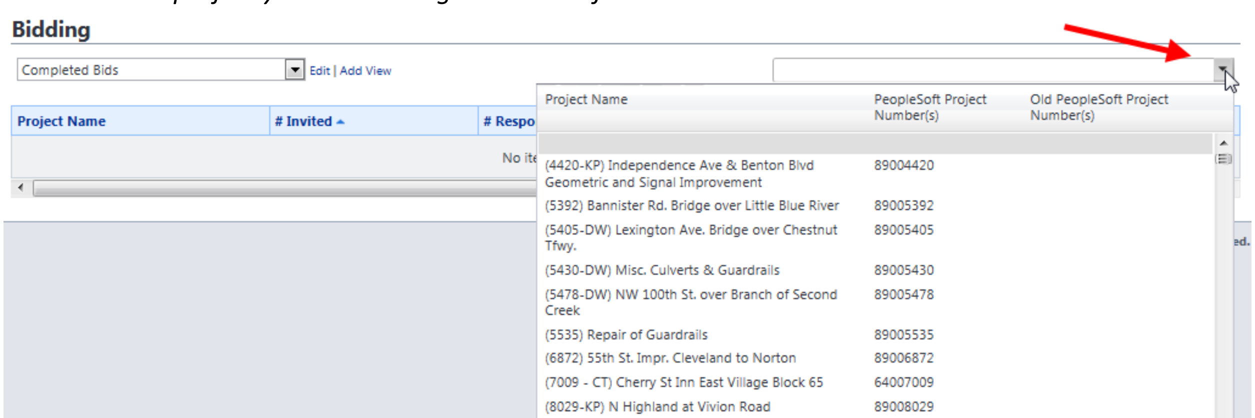


Inviting Bidders/Closing a Bid

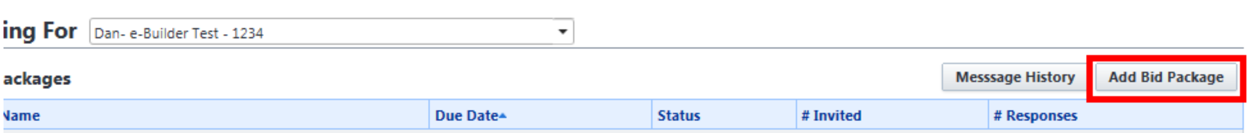
1. *Go to the **Bidding** tab.*



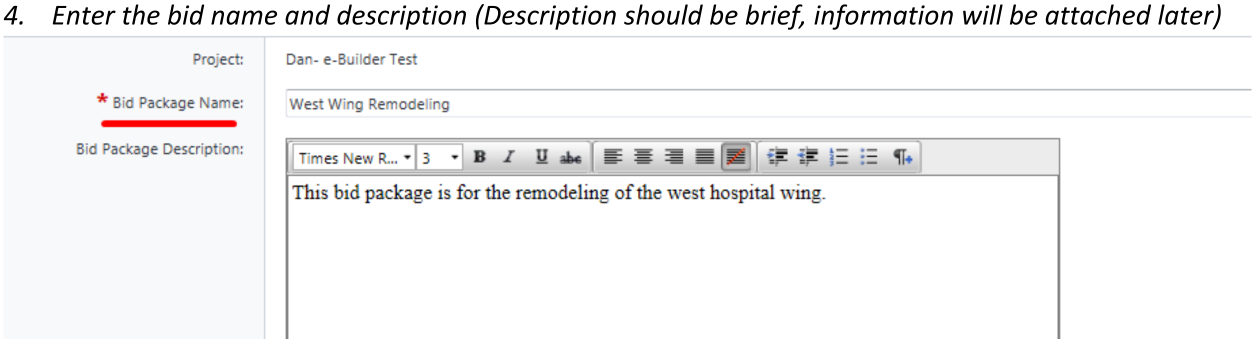
2. *Select the project you are sending the bid out for.*



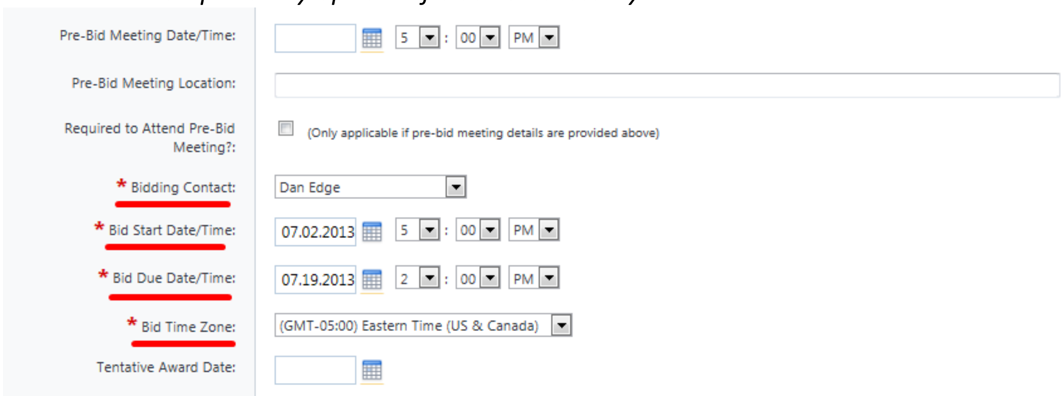
3. *Click **Add Bid Package.***



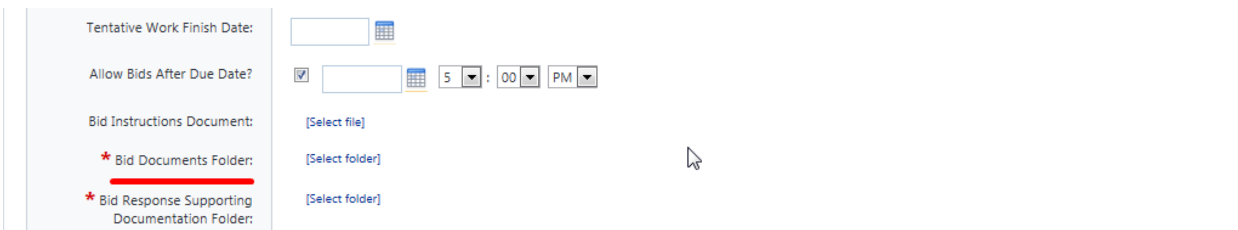
4. *Enter the bid name and description (Description should be brief, information will be attached later)*



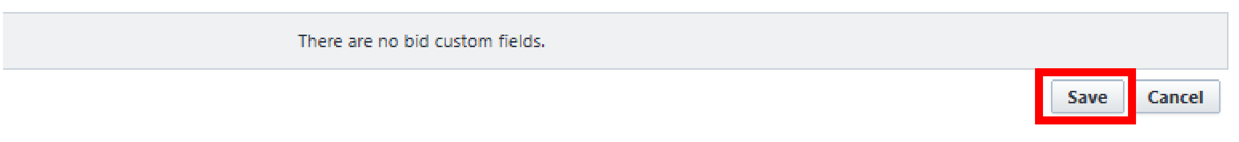
5. *Select the Bidding Contact, Start Date/Time, Due Date/Time, and Bid Time Zone.*
   - *Complete any optional fields as necessary*



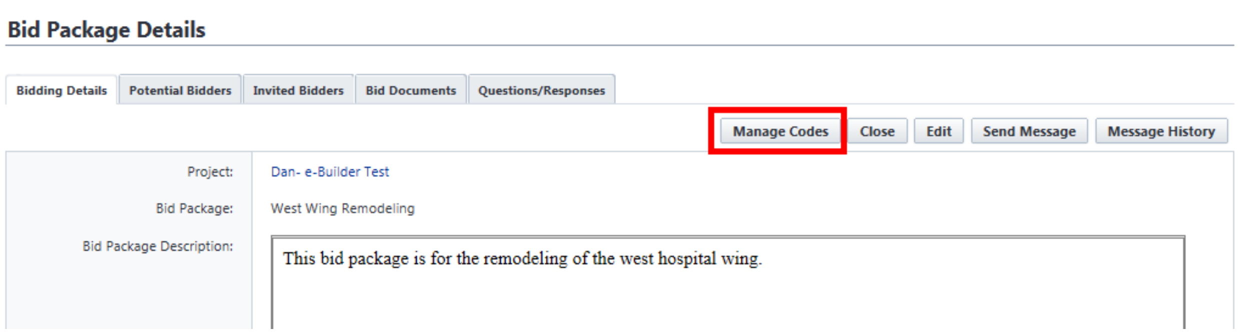
6. *Select the bid documents folder. (The folder to house bid package documentation)*
7. *Select the bid response folder. (The folder to house bid package responses)*



8. *Click **Save**.*

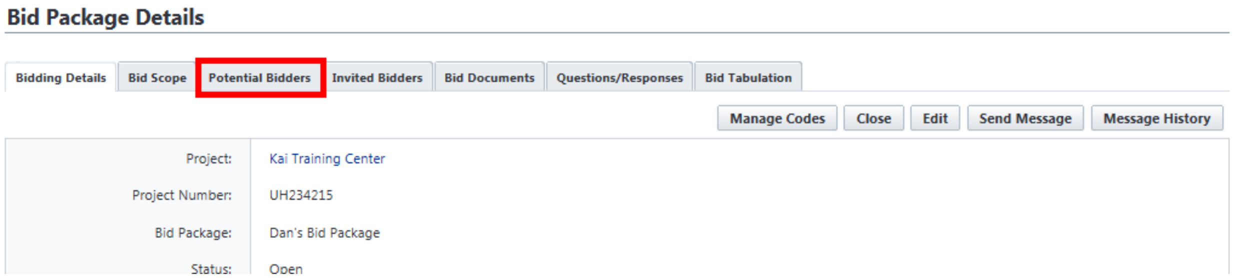


9. *To manage construction codes for the package click **Manage Codes**. (Codes cannot be changed once bidders are added to package)*

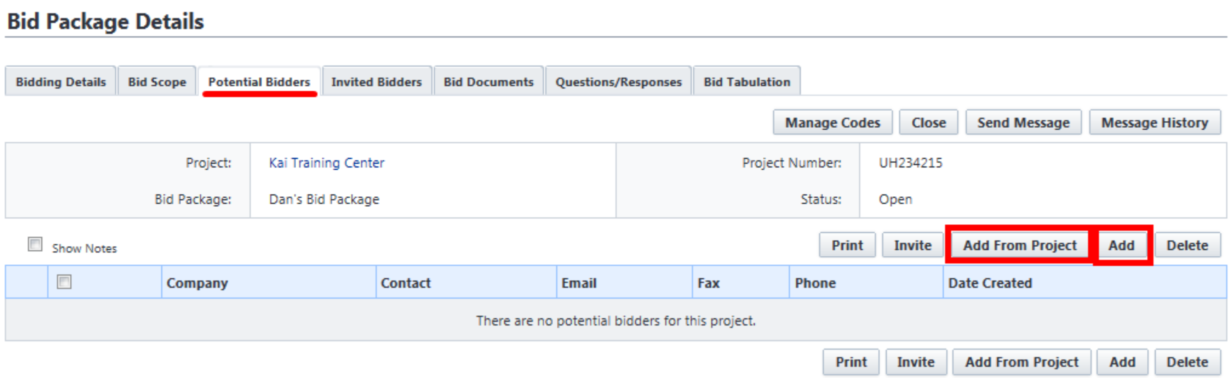


10. *To add documents to bid package, go to documents module and upload documents into folder previously selected to house bid documents.*

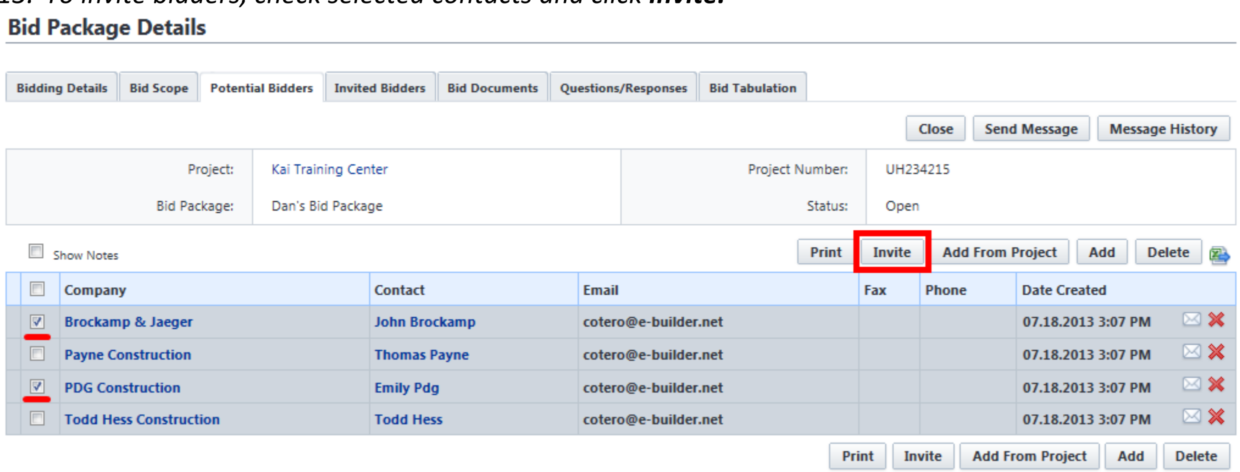
11. *Click **Potential Bidders** to add bidders to bid package.*



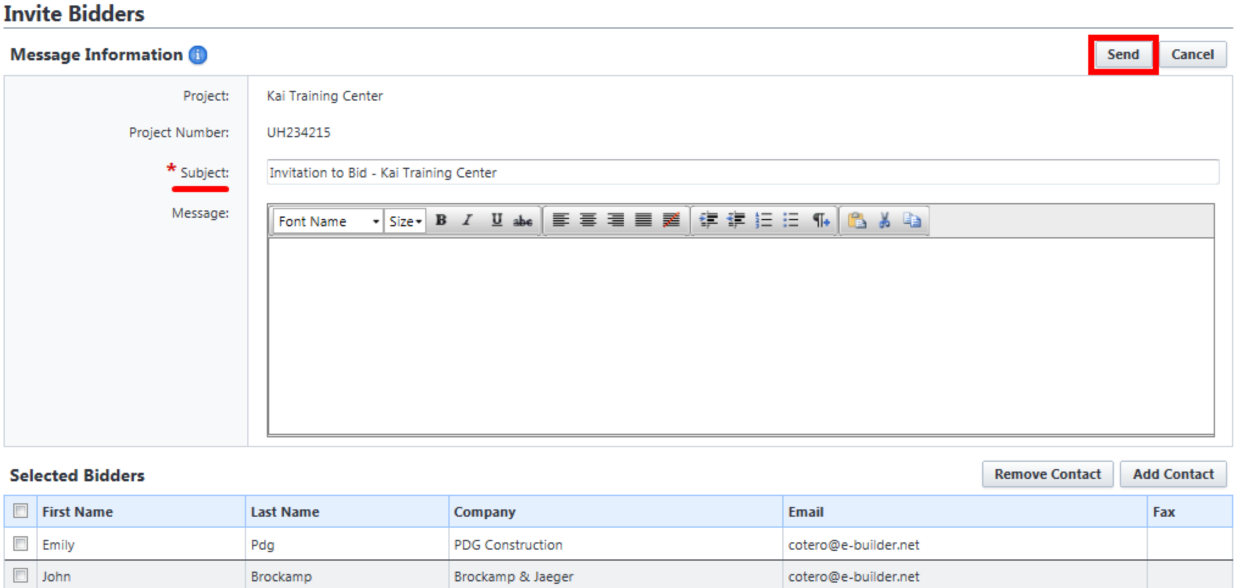
12. *If potential bidders are added to project click **Add From Project**, or click **Add**. (Users must already be a contact)*



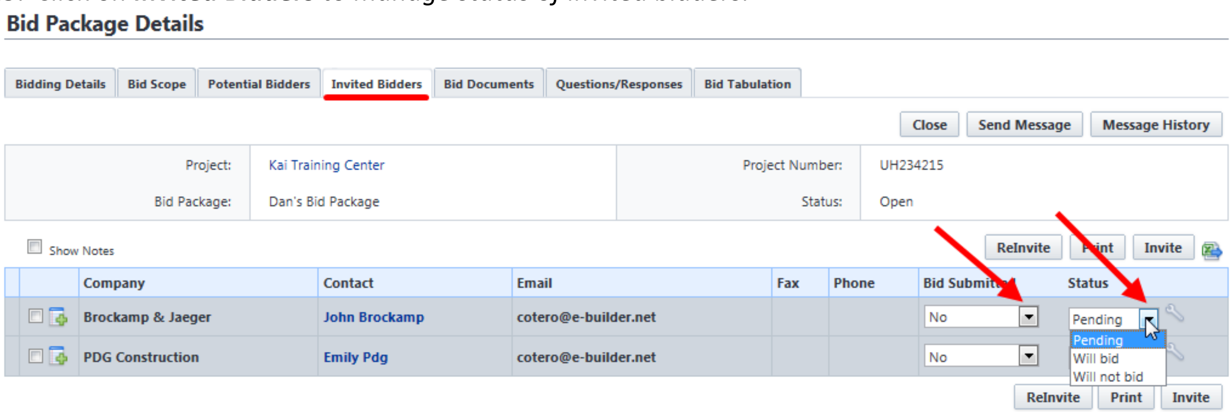
13. *To invite bidders, check selected contacts and click **Invite.***



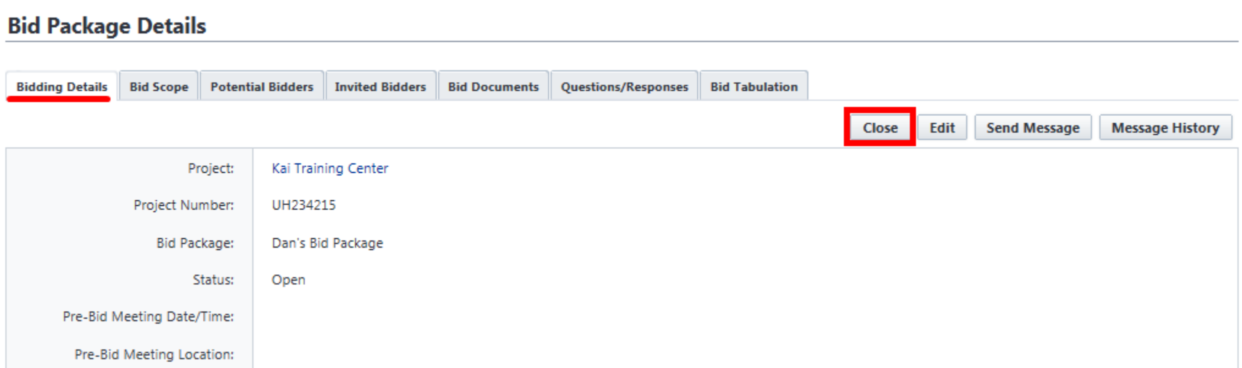
14. *Add a subject and message if needed. Press **Send.***



15. *Click on **Invited Bidders** to manage status of invited bidders.*



16. *Click **Close** to close the bid.*

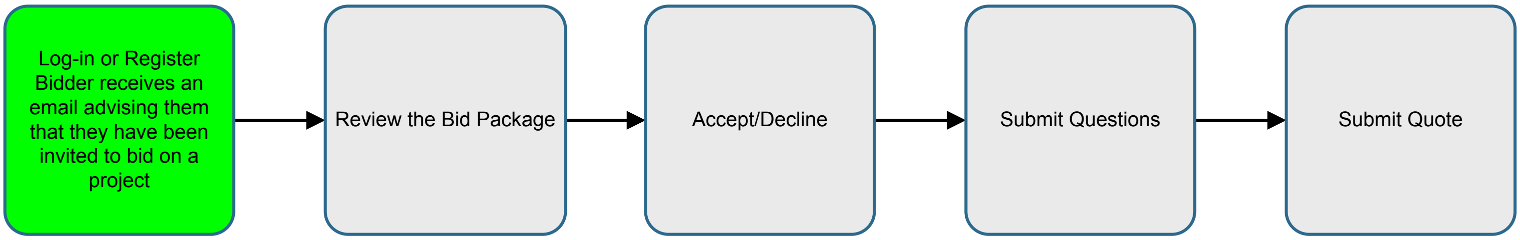


You want to make sure you select the correct bid documents and response folder before inviting any bidders.

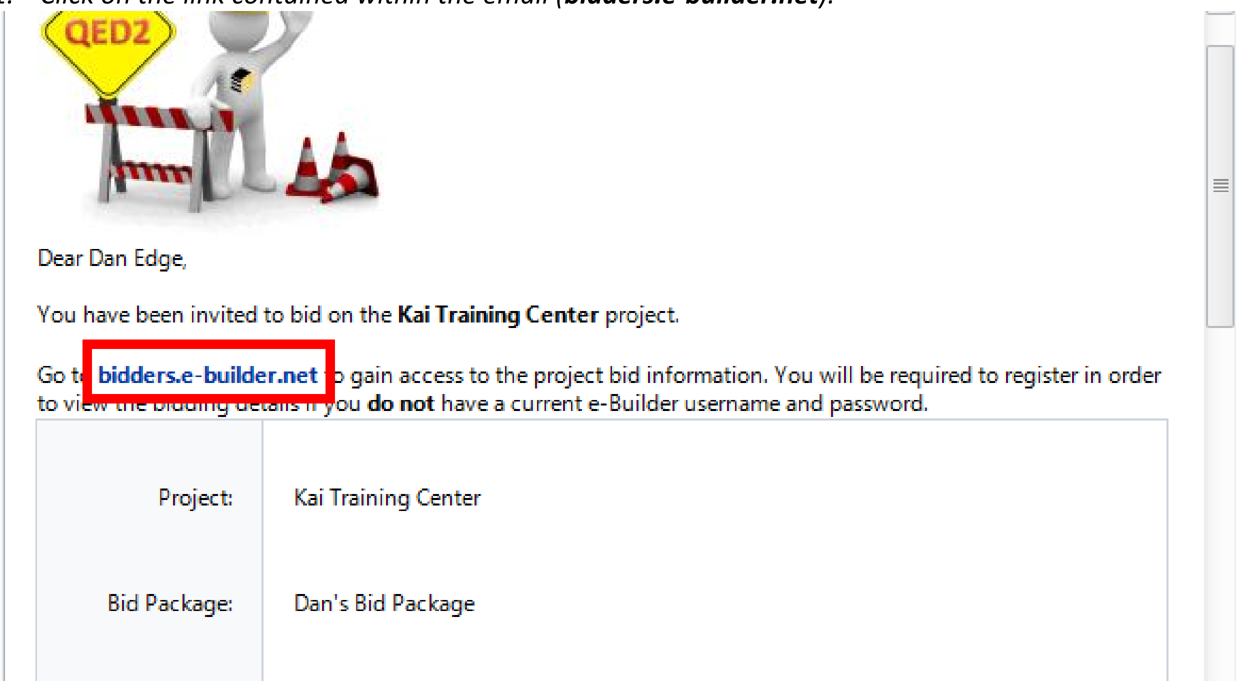
Potential Bidders gives you the option to see what bidders you can invite, but select what bidders you want to invite.

Once the bid has been awarded, close the bid so that no one else sends in bids or accesses the bid documents.

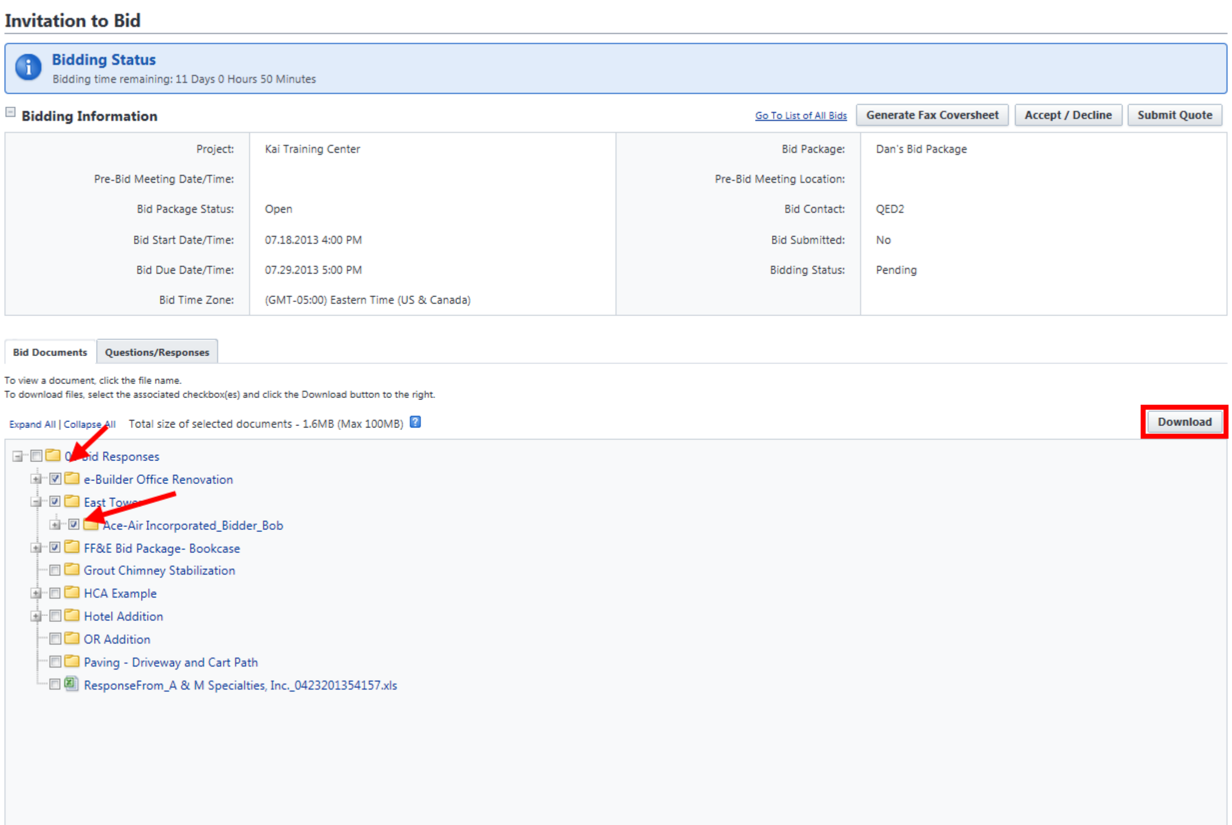
Responding to Bids



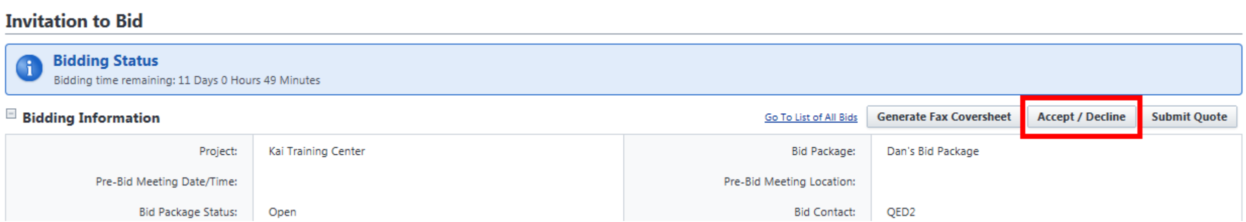
1. *Click on the link contained within the email (**bidders.e-builder.net**).*



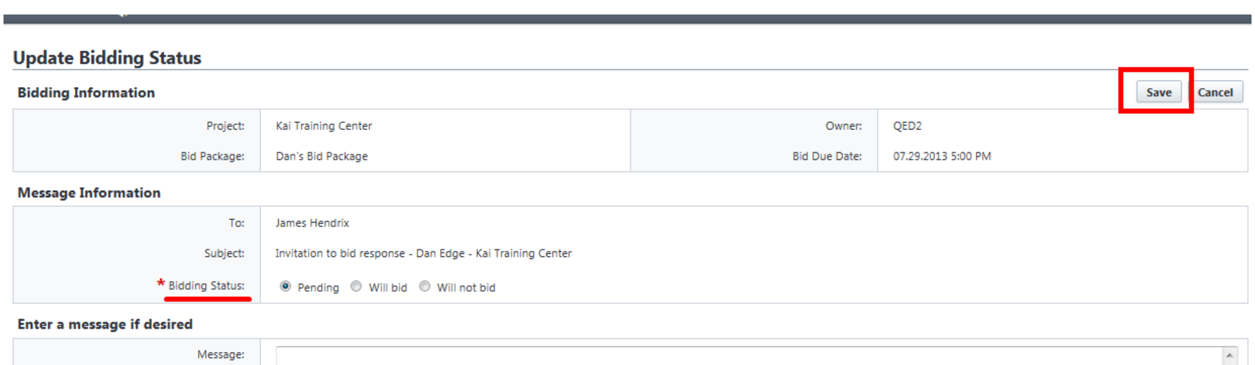
2. *If you are a first time user or do not have a user name or password, you must first register by clicking on the **Register** link.*
3. *If you are not a first time user, enter your user name and password when prompted.*
4. *Once you have accessed the Invited Bidders portal screen you will be directed to the project bid details screen where you can review and download the bid package. The bid package is located towards the bottom of your screen. To download, check appropriate documents/folders and click the **Download** button.*



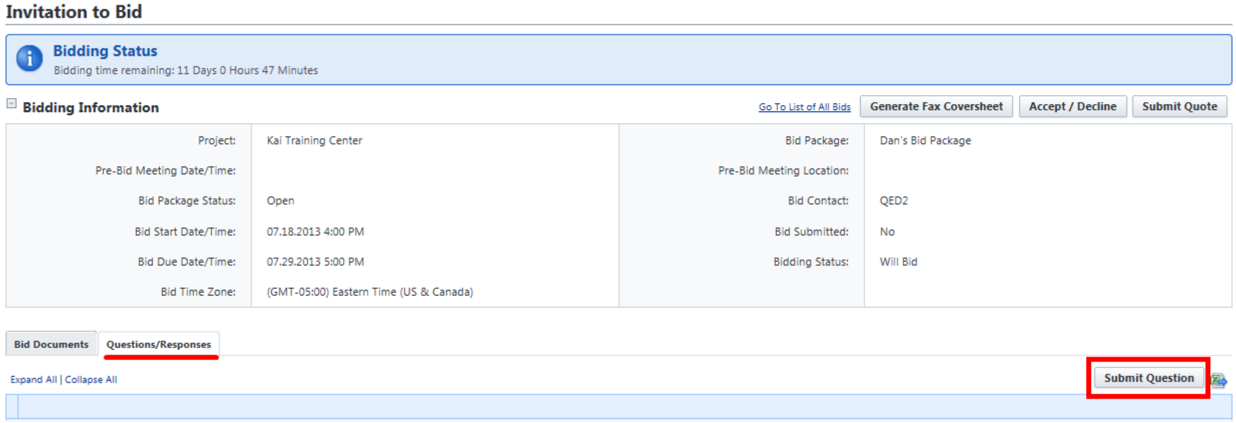
5. *To accept or decline, click on the* ***Accept/Decline*** *button then choose Will Bid or Will Not Bid.*



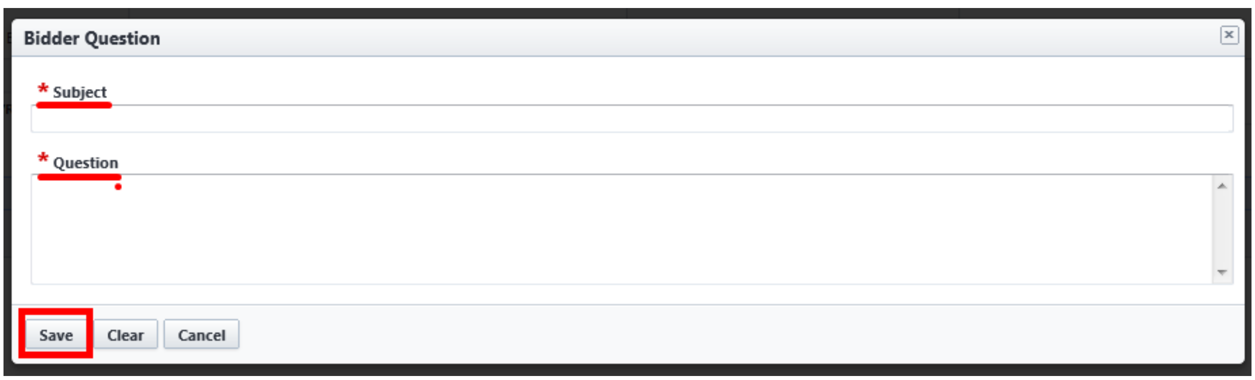
6. *This will automatically notify the person who invited you to bid whether or not you will be bidding on the project.*



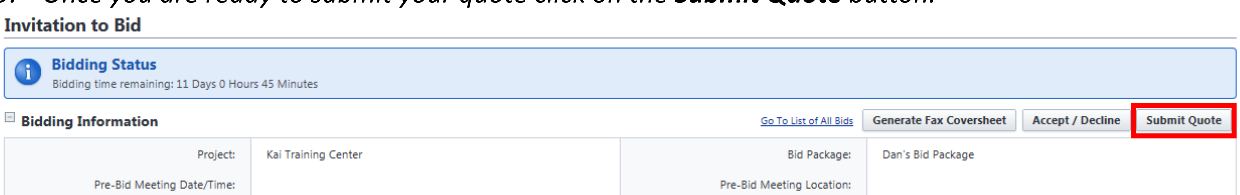
7. *If you have questions relating to the project click the* ***Questions/Responses*** *tab and then click* ***Submit Question*** *button.*



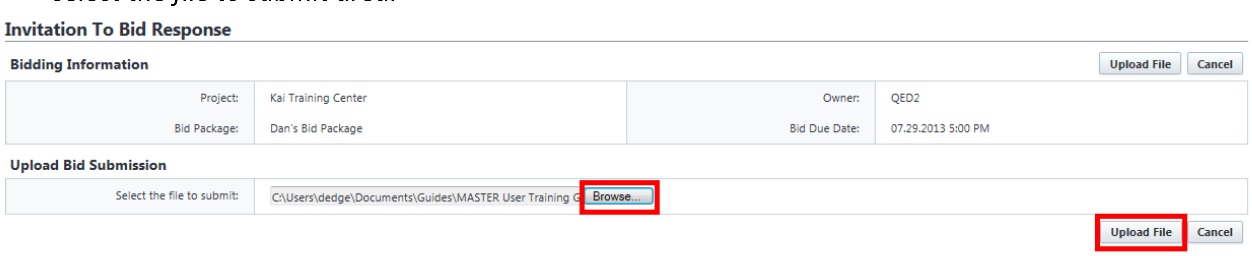
8. *Fill in appropriate fields and press* ***Save.***



9. *Once you are ready to submit your quote click on the* ***Submit Quote*** *button.*



10. *Upload your bid submission by clicking the* ***Browse*** *button.*
11. *Locate the file on your computer and double click the file name. The file will now appear in the select the file to submit area.*



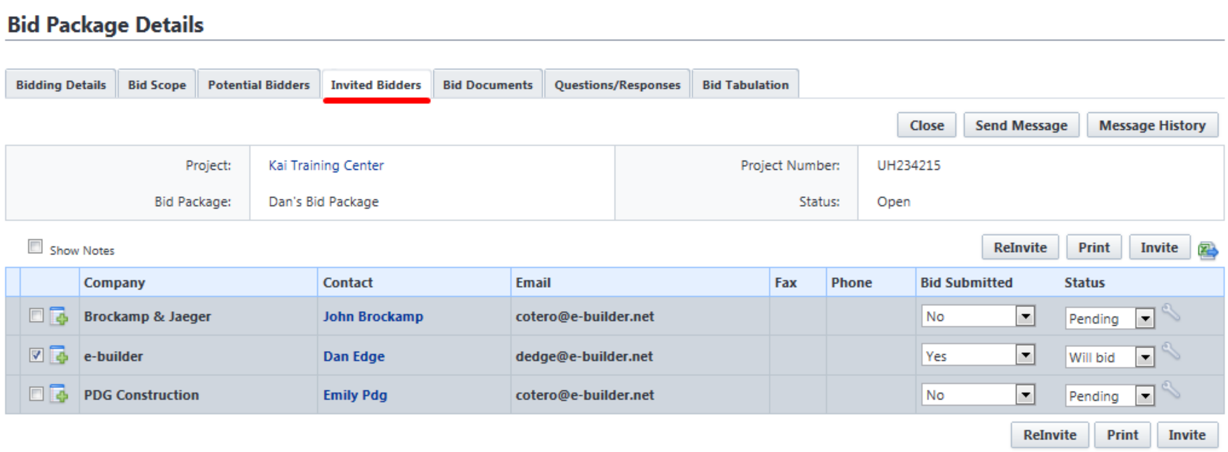
12. *Click* ***Upload*** *File. The file will automatically be sent to a Response file within e-Builder.*
13. *A message stating that "Your quote has been received" will be displayed. Click* ***Continue****.*

14. *The inviting party will then award the project. All invited bidders will be notified if they are selected (awarded) or not selected.*

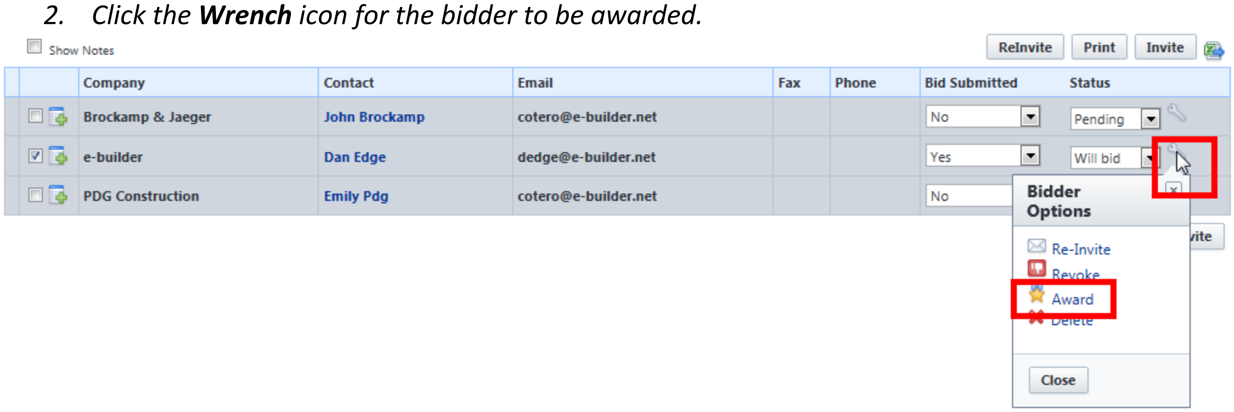
Awarding a Bid

To award the package to a bidder:

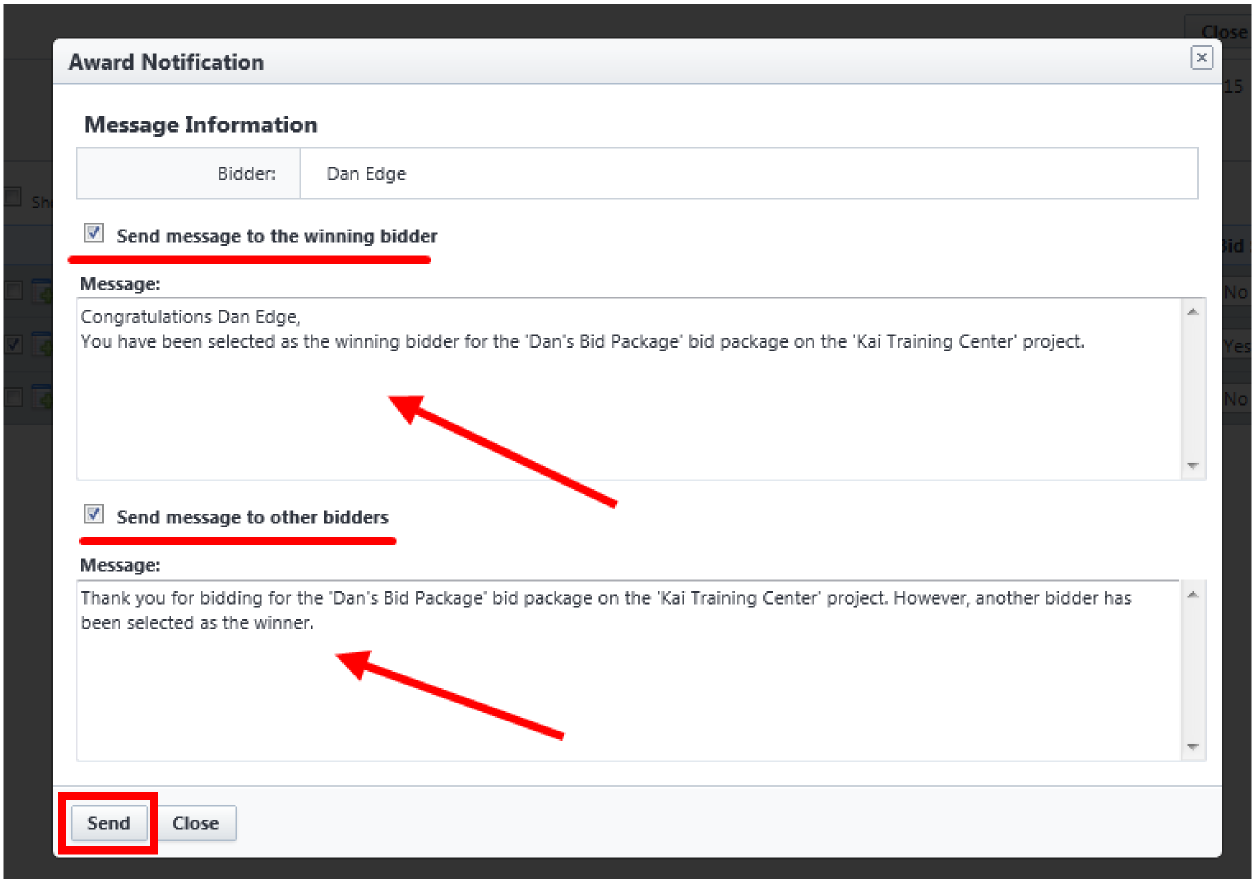
1. *Navigate to **Invited Bidders**.*



2. *Click the **Wrench** icon for the bidder to be awarded.*



3. *Choose to send a message to the winning bidder/other bidders and click* ***Send****.*



Submittal Module

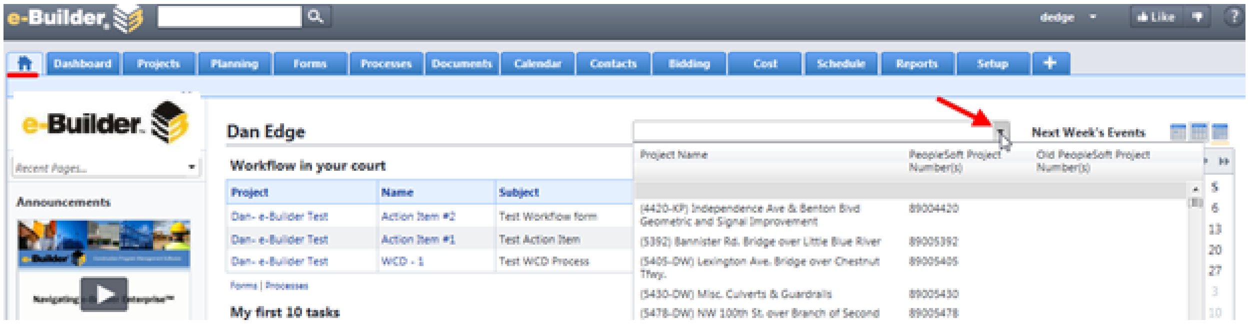
The submittal process will follow these general steps:
(Outlined in detail below)

1. Contractor will import submittal items.
2. Contractor will send submittal items to sub-contractors for documentation (if necessary)
3. Contractor will bundle submittal items into Submittal Packages
4. Contractor will send submittal packages to Architect for review
5. Architect will send items to consultants for review (if necessary)
6. Architect will send submittal packages back to Contractor as confirmation or request revision
7. Contractor will notify sub-contractors and close items

Accessing the Submittal Module

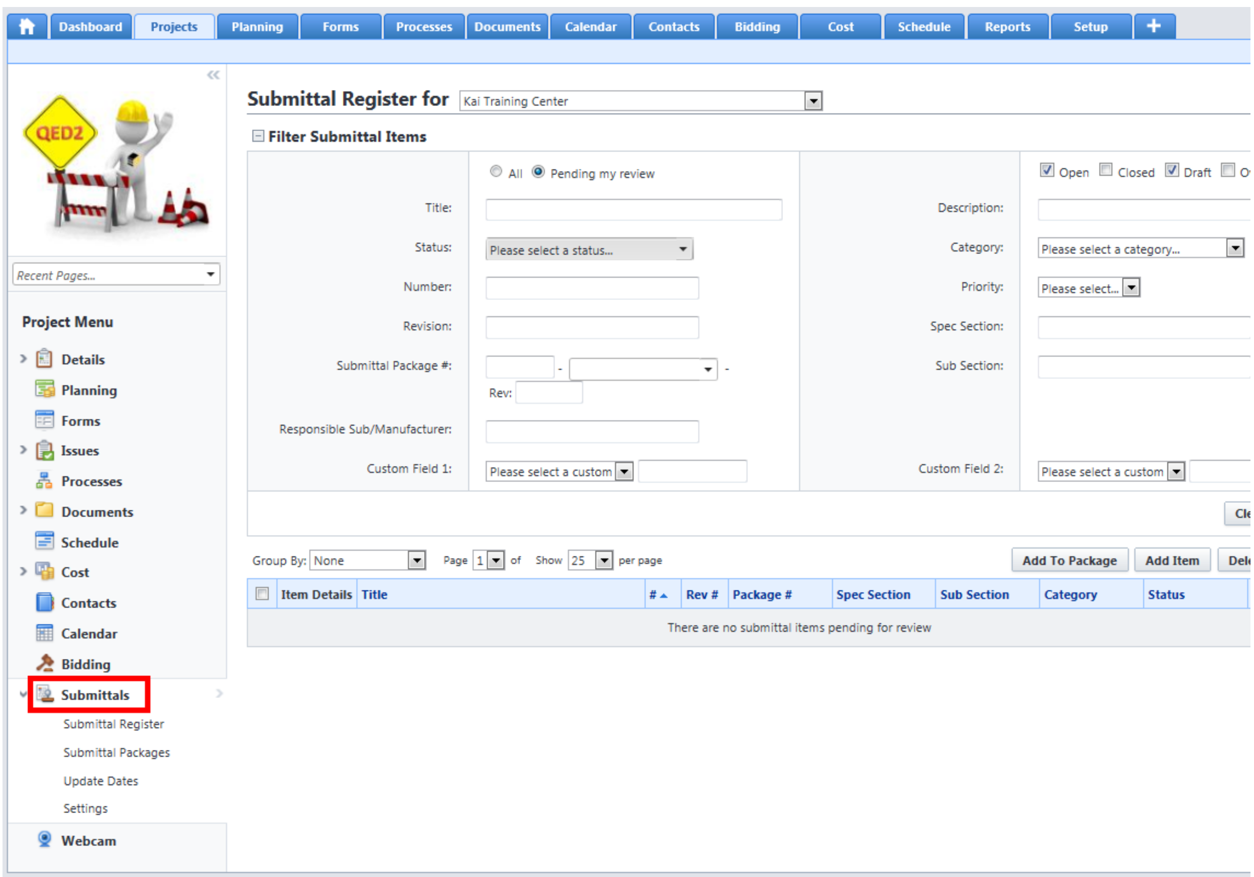
The following are the steps to accessing the submittal module:

1. *At the home Screen, select the Project you are accessing by using the drop down menu.*



2. *On the left side, click the* ***Submittals*** *link.*

2. *On the left side, click the* ***Submittals*** *link.*

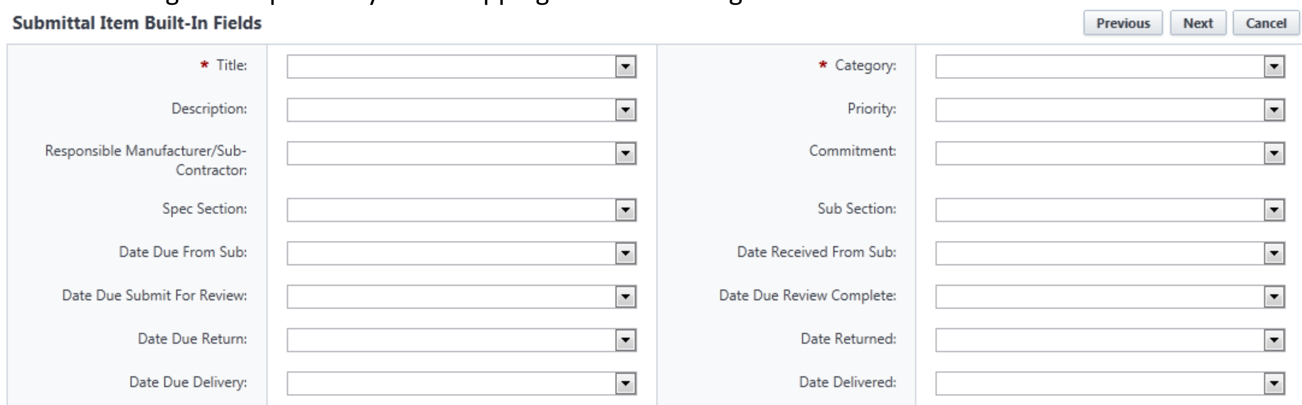


Creating a Submittal Registry (Importing Submittals)

Contractor will create a log of all the items to be submitted for the project. This log can be created in Excel and imported into e-Builder or it can be entered into the system one by one.

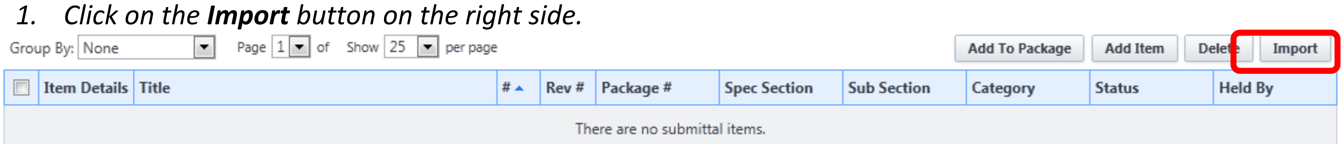
Importing the Registry

If your import file column headers map the e-Builder field names, it will allow you to import your data without having to complete any field mappings. The following are the e-Builder field names:

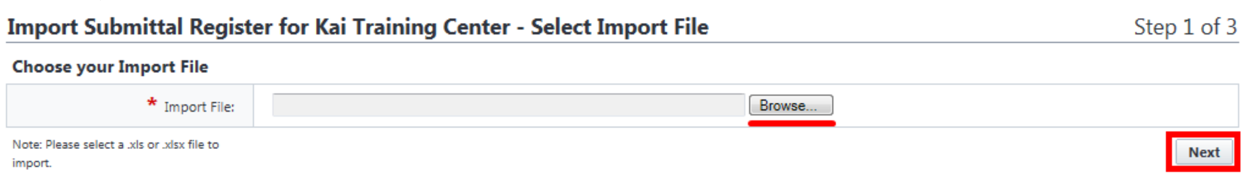


From the Submittal Register page:

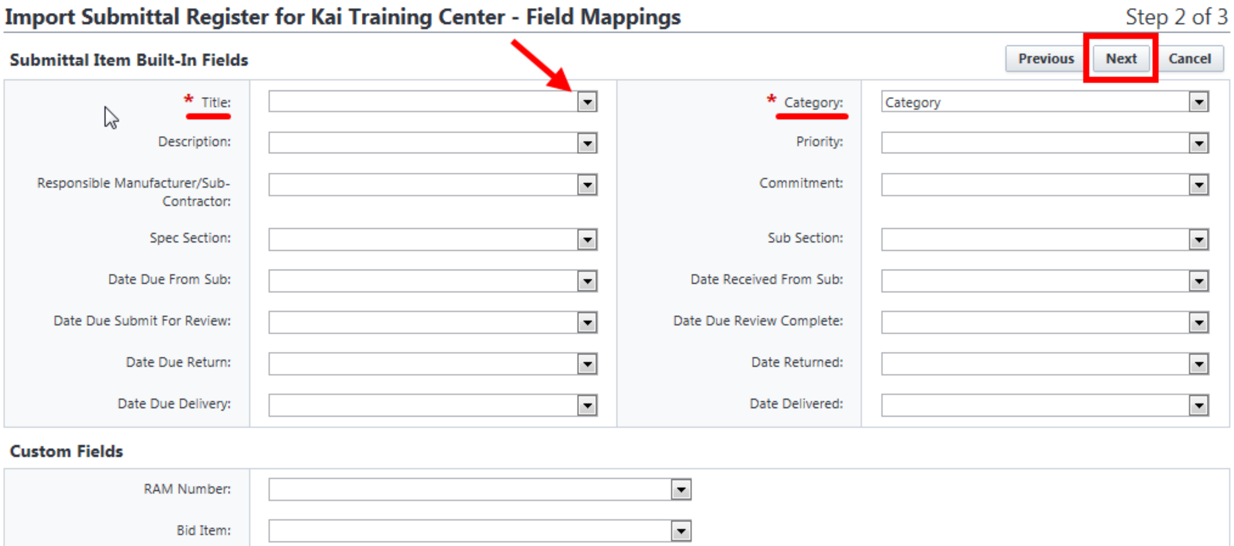
1. *Click on the **Import** button on the right side.*



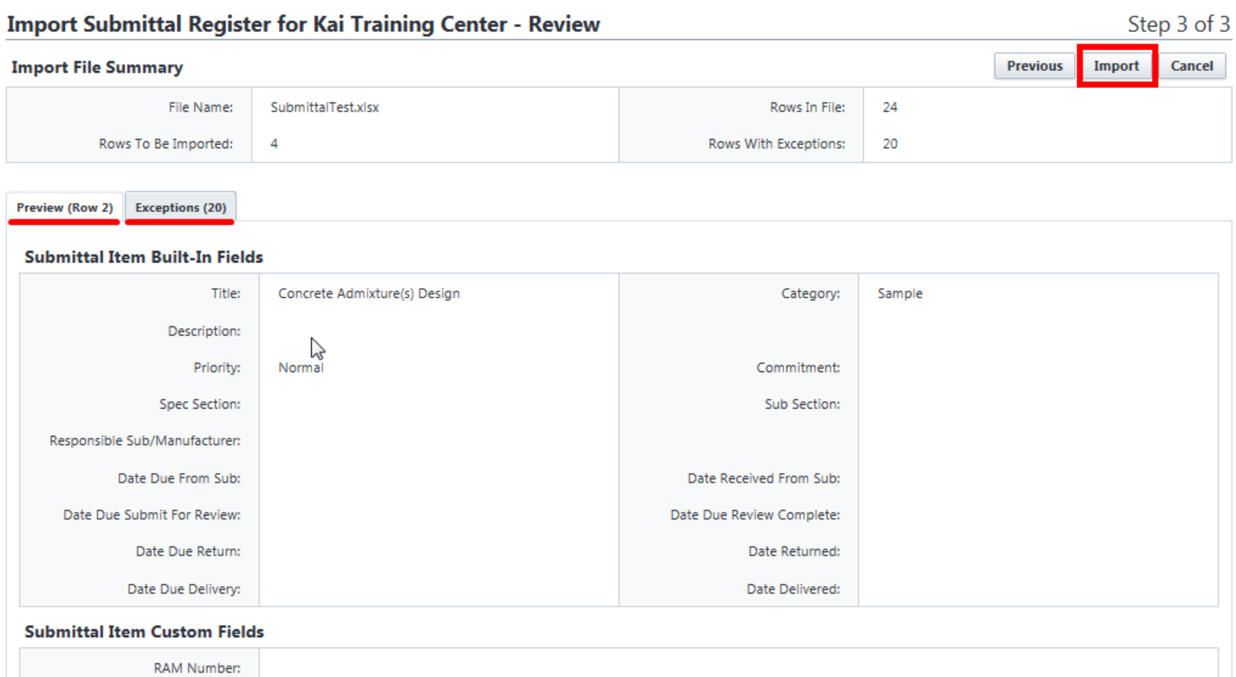
2. *Select your submittal log file by clicking browse and locating where the file is stored on your computer.*



3. *Once you select the file, click **Next**.*
4. *If the columns in your file are the same as the columns in e-Builder, they should automatically map on this page. If not, select the correct file in the drop down list next to each field that should be mapped for import. Once all fields are mapped, click **Next**.*



5. *Preview the Import. This screen will allow you to preview one of the lines to be imported to make sure the fields are mapped correctly. If any rows cannot be imported due to invalid data, they would be listed in the exceptions tab. If all rows are importing correctly, click **Import**.*

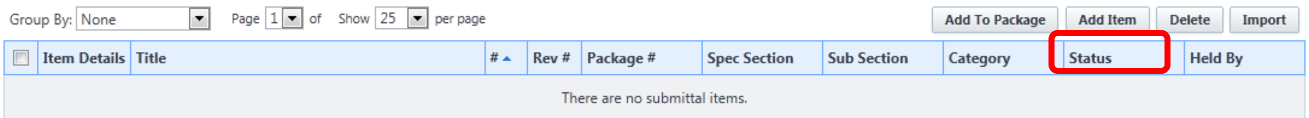


Note: The file type must be in Microsoft 2003 format - .xls
Note: If there are any exceptions, you will want to make note of them, cancel the import, correct the exceptions in the file and then re-import the file in.

Adding Items One at a Time

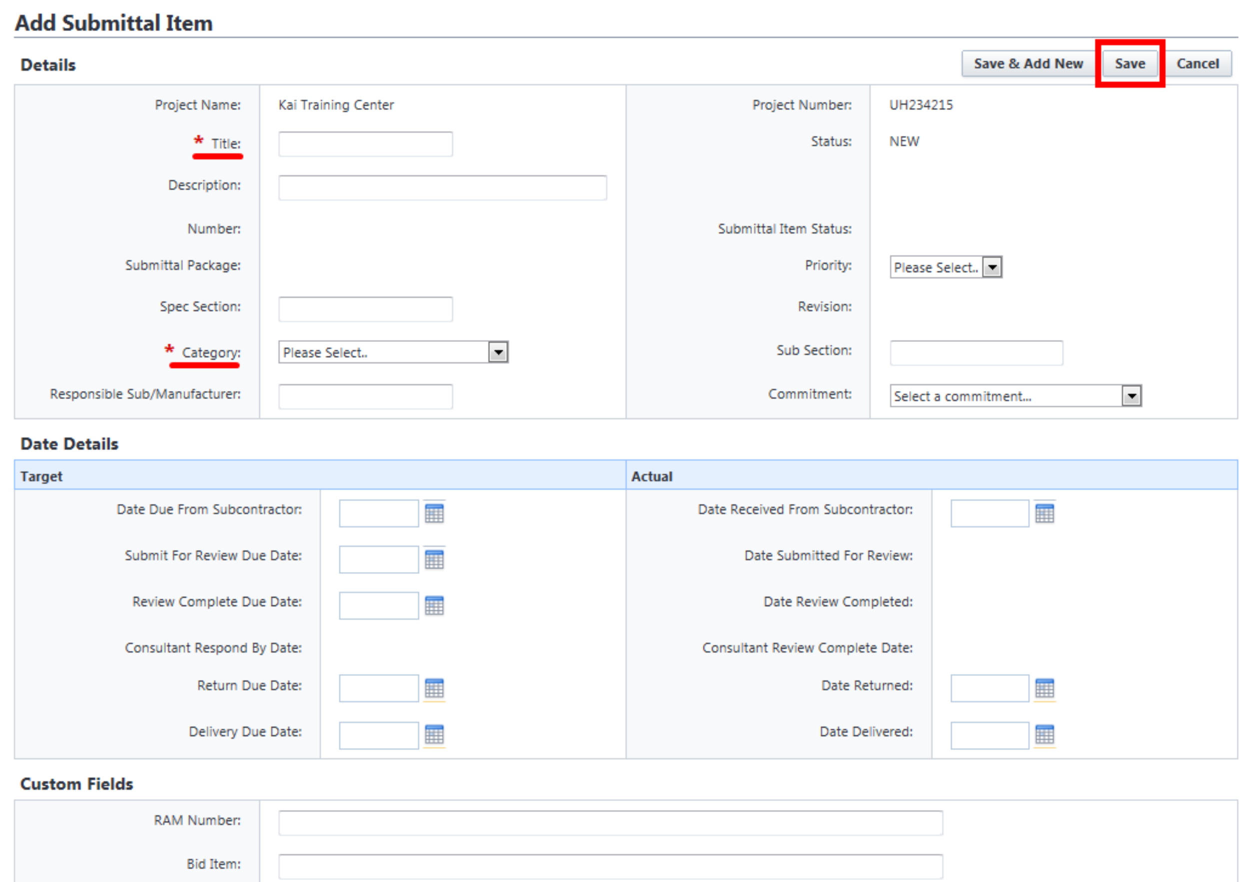
From the Submittal Register page:

1. *Click on the **Add Items** button on the right side.*



2. *Enter the information for the following fields:*
   - *Title – title of the item*
   - *Description – description of the item*
   - *Priority – Low, Normal High*
   - *Spec Section – Spec Section Number*
   - *Sub Section – Sub Section Number*
   - *Category – Mock up, Sample, Shop Drawing, etc.*
   - *Responsible Sub/Manufacturer – Name of Company*
   - *Due dates – enter all due dates for the item.*
   - *Custom Fields – enter any custom fields if necessary*

3. *Click **Save**. (Click **Save & Add New** to save item and quickly return to entry page for multiple submittal additions)*



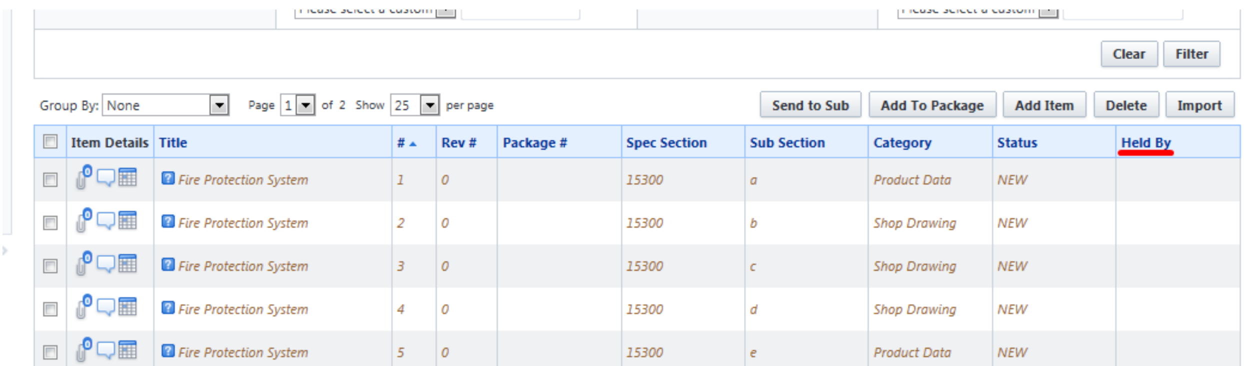
Updating Submittal Items

In preparation to send the item to the Architect for review, the Contractor has the ability to send the item to the Subcontractor to attach the documentation to be submitted or the Contractor can upload the documentation and attach it to the item.

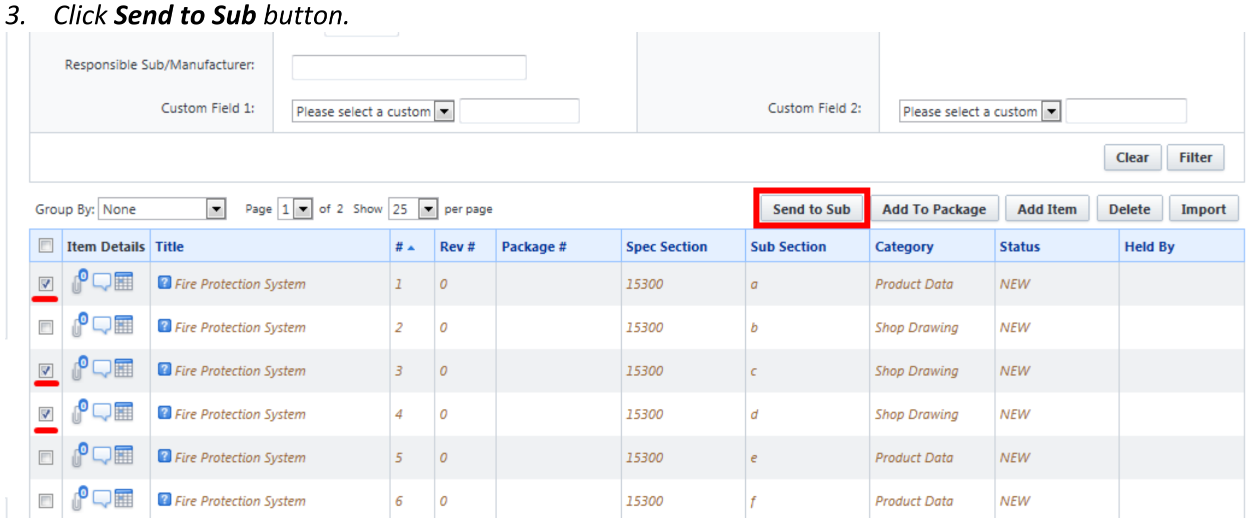
Sending to Subcontractor

Sending the item to the Subcontractor will place their name in the Held By field and give them access to upload the documents to the item. The Sub does not need to be an e-Builder User to update the item.

Note: if the Held By field is blank it denotes that the item has only been uploaded and not placed in a user's court

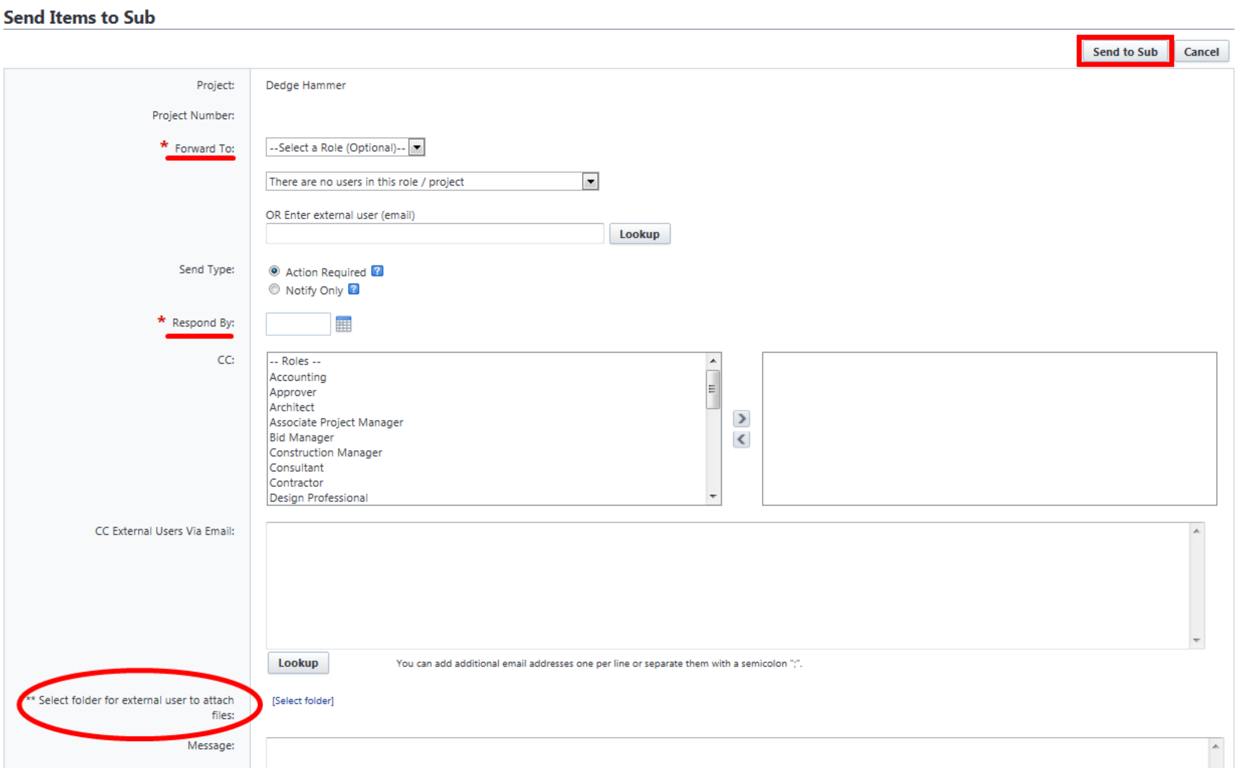


1. *From the Submittal Register screen:*
2. *Select the item that you want to send to Sub by checking appropriate boxes. (Can also click title of item and send from that page)*
3. *Click **Send to Sub** button.*



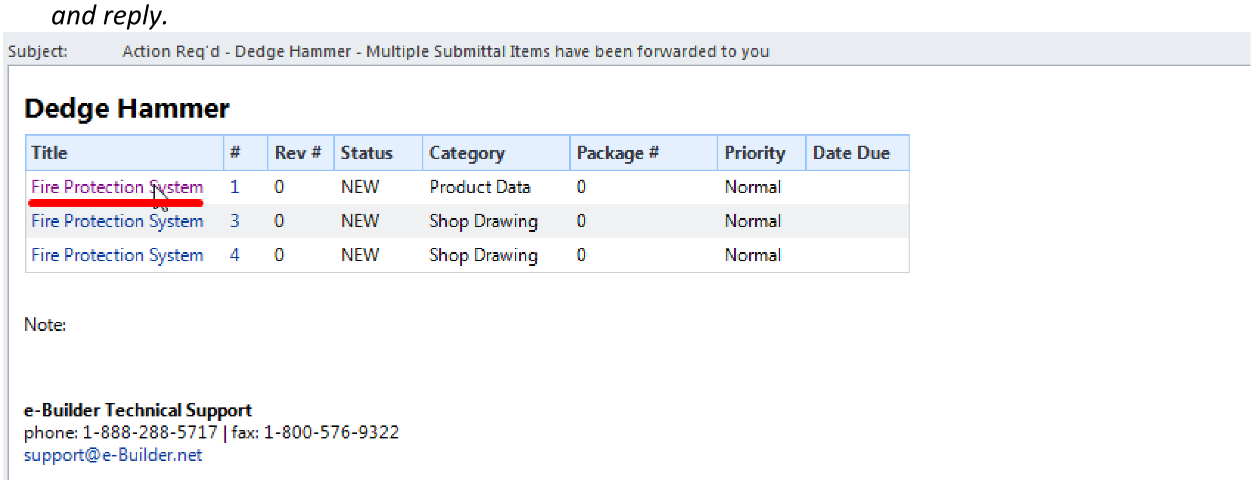
4. *If the Sub is an e-Builder user, search for their name in the Select Recipients drop down list. If they are not an e-Builder user, you can type their email address in the Enter external user (email) box.*
5. *Give them a date to Respond By.*

6. *Select any e-Builder users you wish to copy on the message or type in the email address of any external users you wish to copy.*
7. *If you are sending this message to any external users, you must select a folder that any documents they attach will be stored in. This field is required if external users are selected.*
8. *Type a message to send to the recipient.*
9. *Click **Send to Sub**.*



Note: The lookup button allows you to look up the email address of any contact within the contacts module. If a contact's email address is not updated, inform the e-Builder Admin and they can update it for you.

10. *If external user, user will receive an email. User will click into individual items to attach documents and reply.*



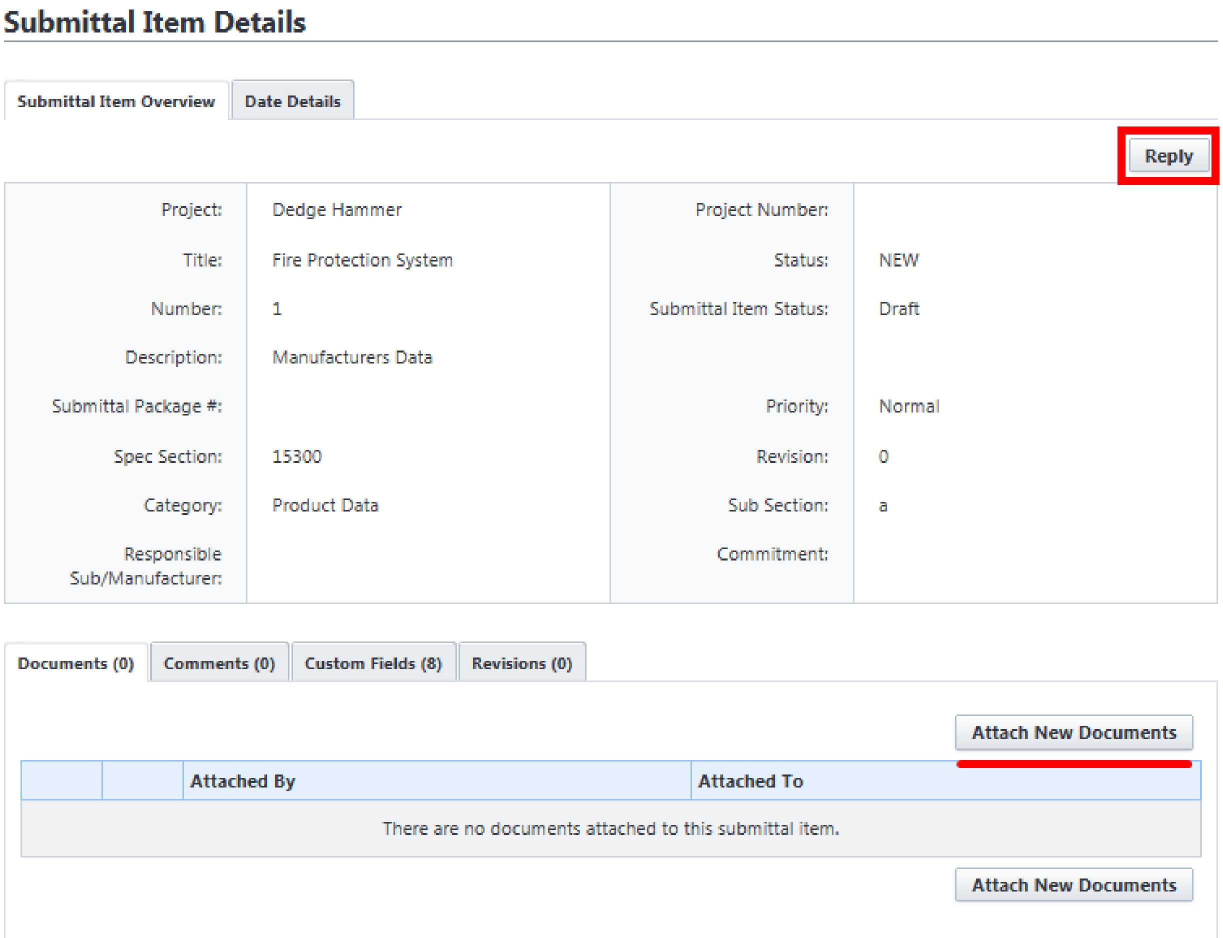
Subject: Action Req'd - Dedge Hammer - Multiple Submittal Items have been forwarded to you

Dedge Hammer

Title	#	Rev #	Status	Category	Package #	Priority	Date Due
Fire Protection System	1	0	NEW	Product Data	0	Normal	
Fire Protection System	3	0	NEW	Shop Drawing	0	Normal	
Fire Protection System	4	0	NEW	Shop Drawing	0	Normal	

Note:

e-Builder Technical Support
phone: 1-888-288-5717 | fax: 1-800-576-9322
support@e-Builder.net

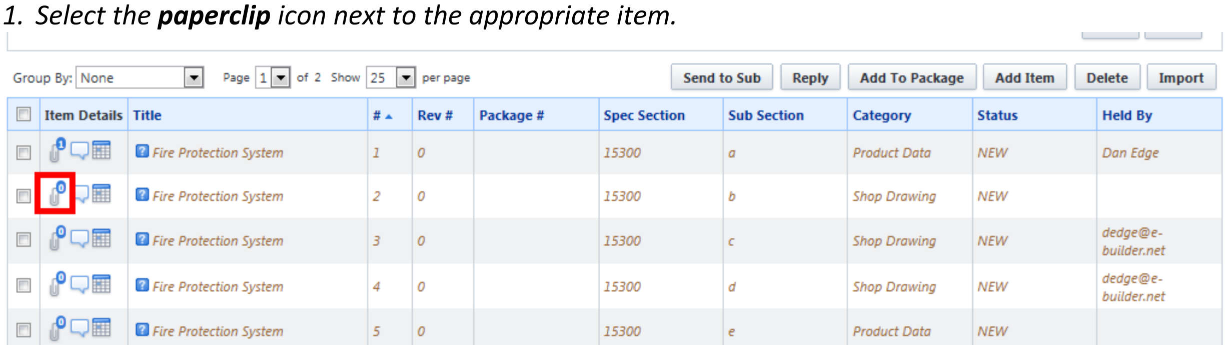


Attaching Documents

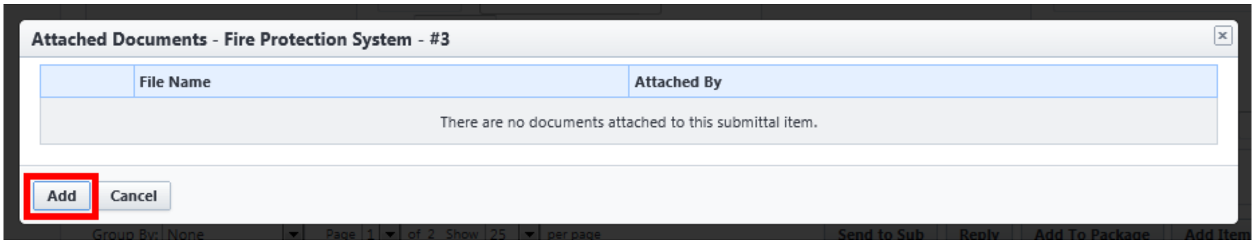
If the Contractor has the documents to be submitted to the Architect, they have the ability of attaching the documents without sending the item to the Sub.

From the Submittal Register screen:

11. *Select the **paperclip** icon next to the appropriate item.*



12. *Click on the **Add** button.*



13. *See Uploading Documents (In Documents section) for more information*

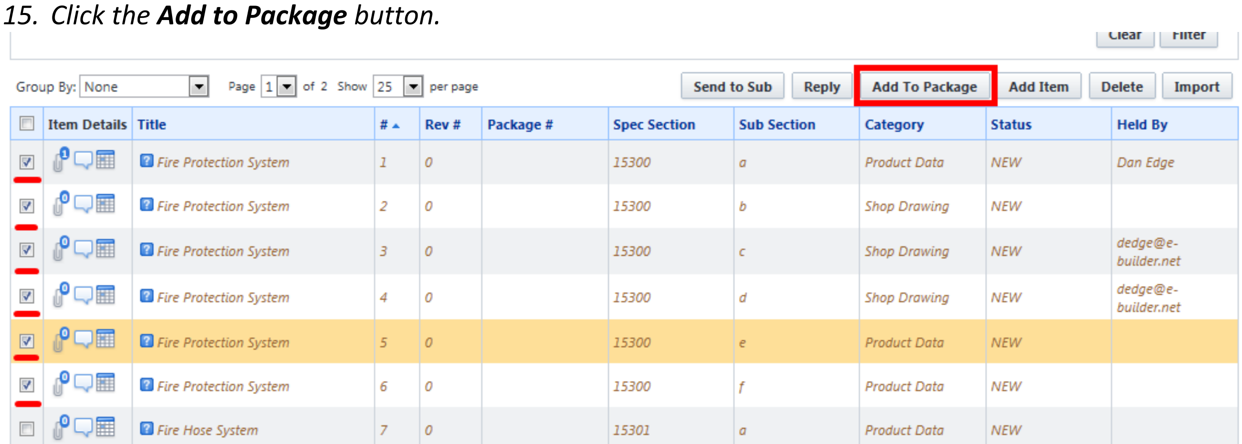
Submitting to Architect

Creating a Submittal Package

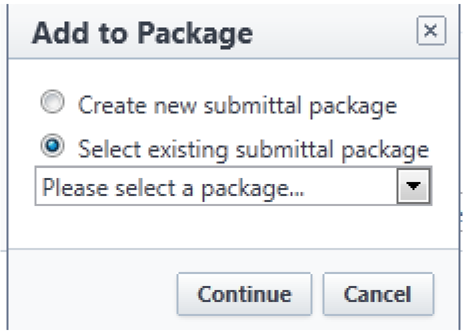
A submittal package gives the Contractor the ability to group several submittal items together to submit to the Architect. If one item needs a response faster than the other items, it is recommended to send that item in its own package. The Architect must review all items before submitting the package back to the Contractor.

From the Submittal Register screen:

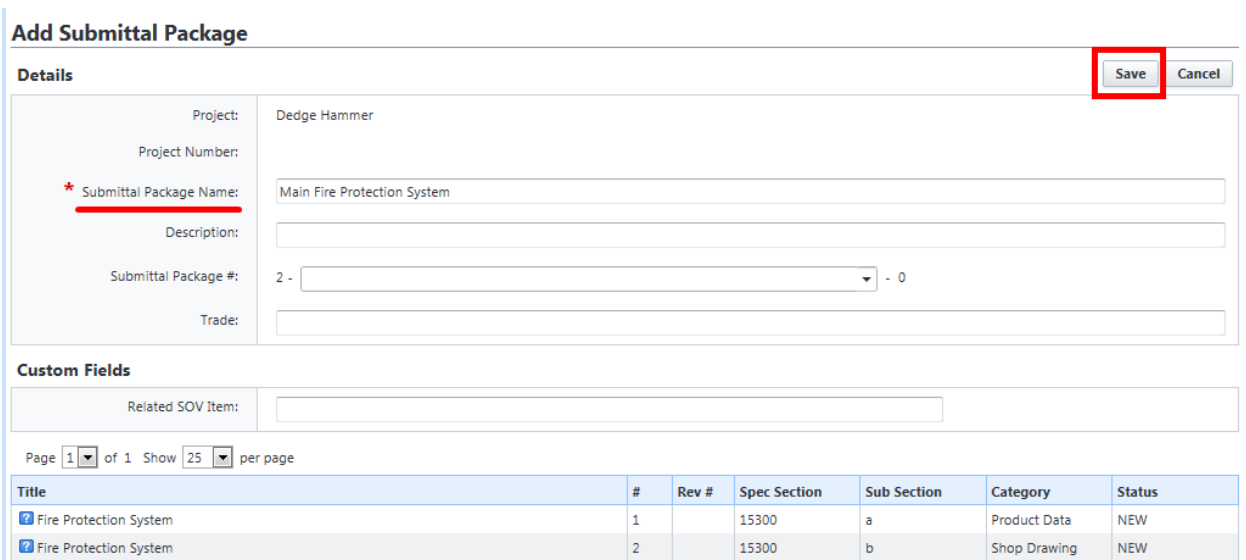
14. *Select the checkboxes next to the items that you would like to package together.*
15. *Click the **Add to Package** button.*



16. *Select if you will be Create a new submittal package or Select existing submittal package, click **Continue**.*



17. *Enter the following information*
    - *Submittal Package Name*
    - *Description*
    - *Submittal Package #*
    - *Trade*
18. *Click **Save.***



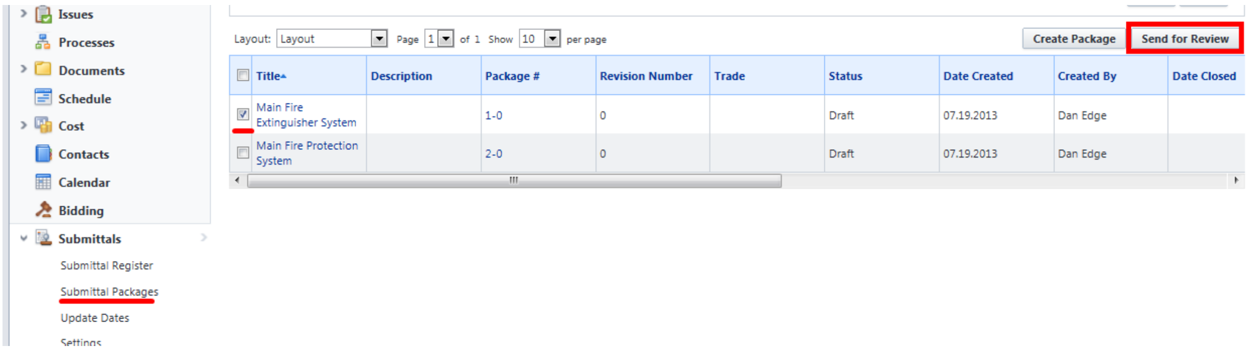
Note: Items added to a package will be displayed in blue text (vs. brown)

Sending the Package for Review

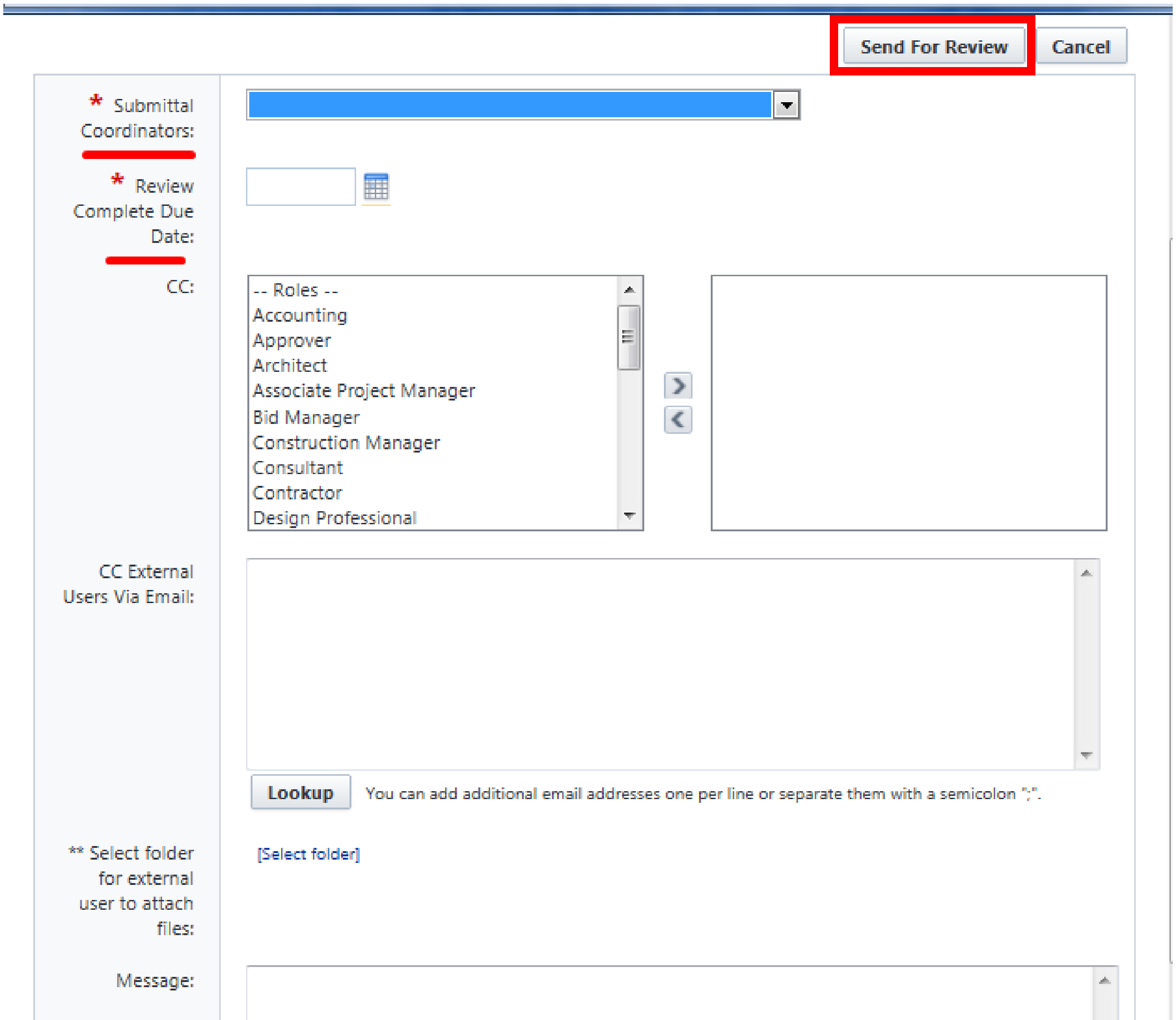
When sending the package for review it is placing the package in the Architect's court and request a response by a specific date.

From the Submittal Package screen:

1. *Check appropriate package and click **Send for Review.***



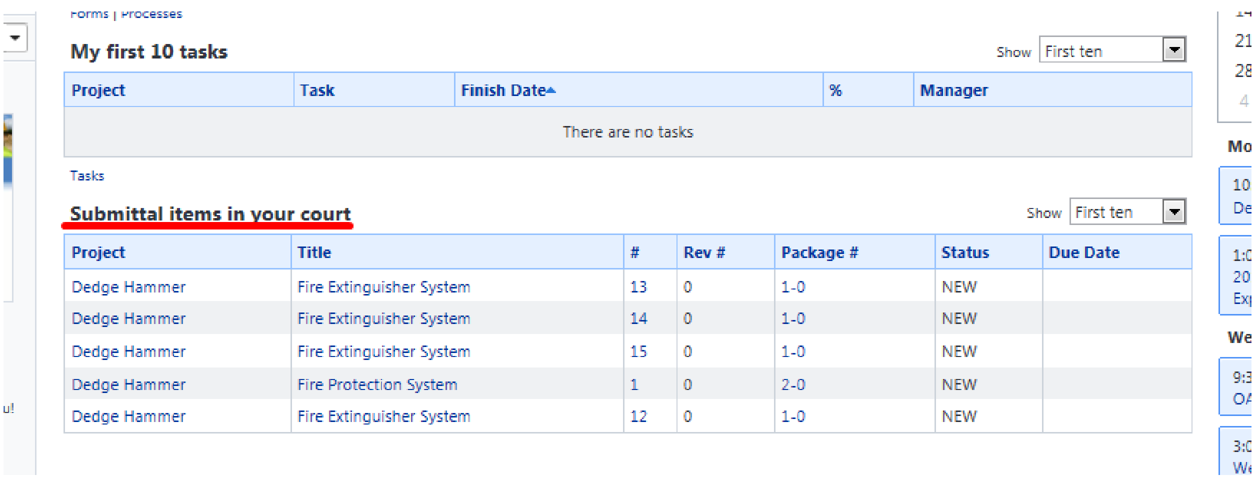
2. *Select the Architect's Name in the Submittal Coordinator's drop down.*
3. *Enter a Review Complete Due Date.*
4. *Select any e-Builder Users you would like to copy.*
5. *Select any external users that you would like to copy.*
6. *If an external user is selected, you must select a folder for external users to attach files to be saved in.*
7. *Type in a message.*
8. *Click **Send for Review**.*



Reviewing the Package

Once the package has been submitted by the Contractor for review it is in the Architect's court to review the data, update the status and respond to the Contractor. The Architect will receive a notification that the package has been sent for review and the package details will display on the Architect's home page.

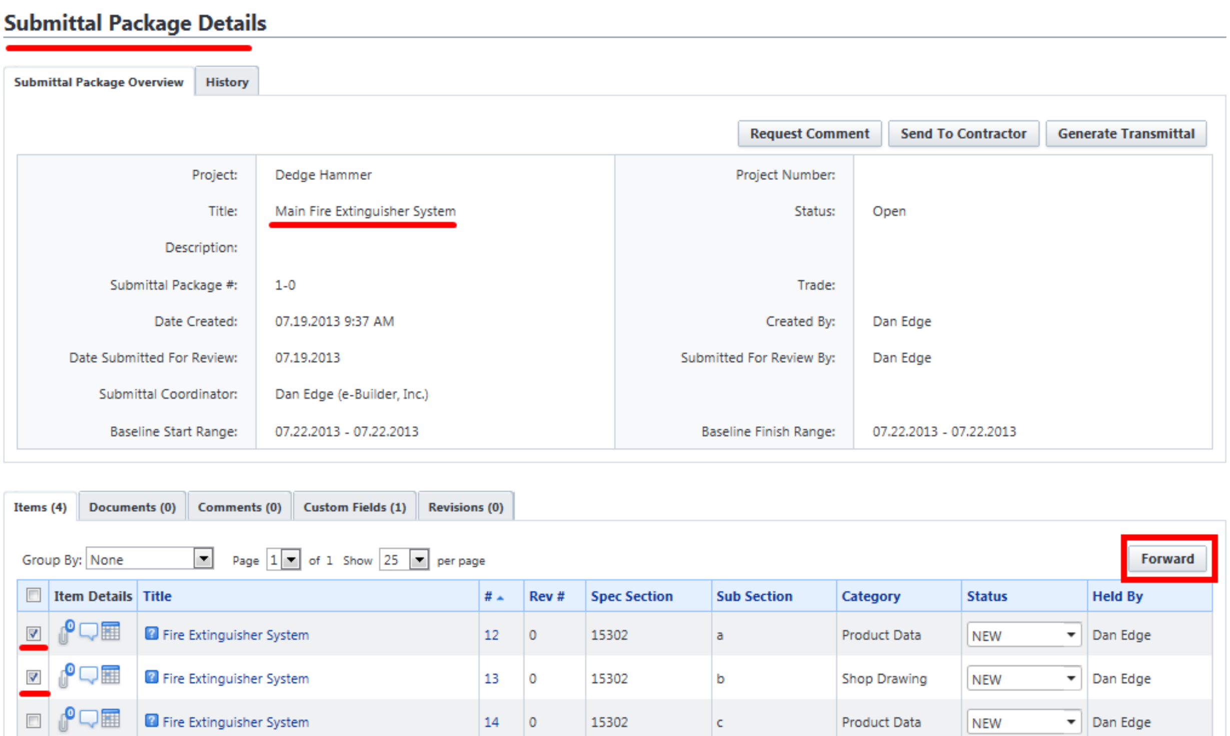
The Architect has the ability to send the package to the Consultants for review and comments. The Consultants will be able to view and download the documents submitted by the Contractor, if they have comments or markup the document they have the ability to re-upload the document to the submittal item. Submittal Items will appear on the Architect's home screen under Submittal items in your court



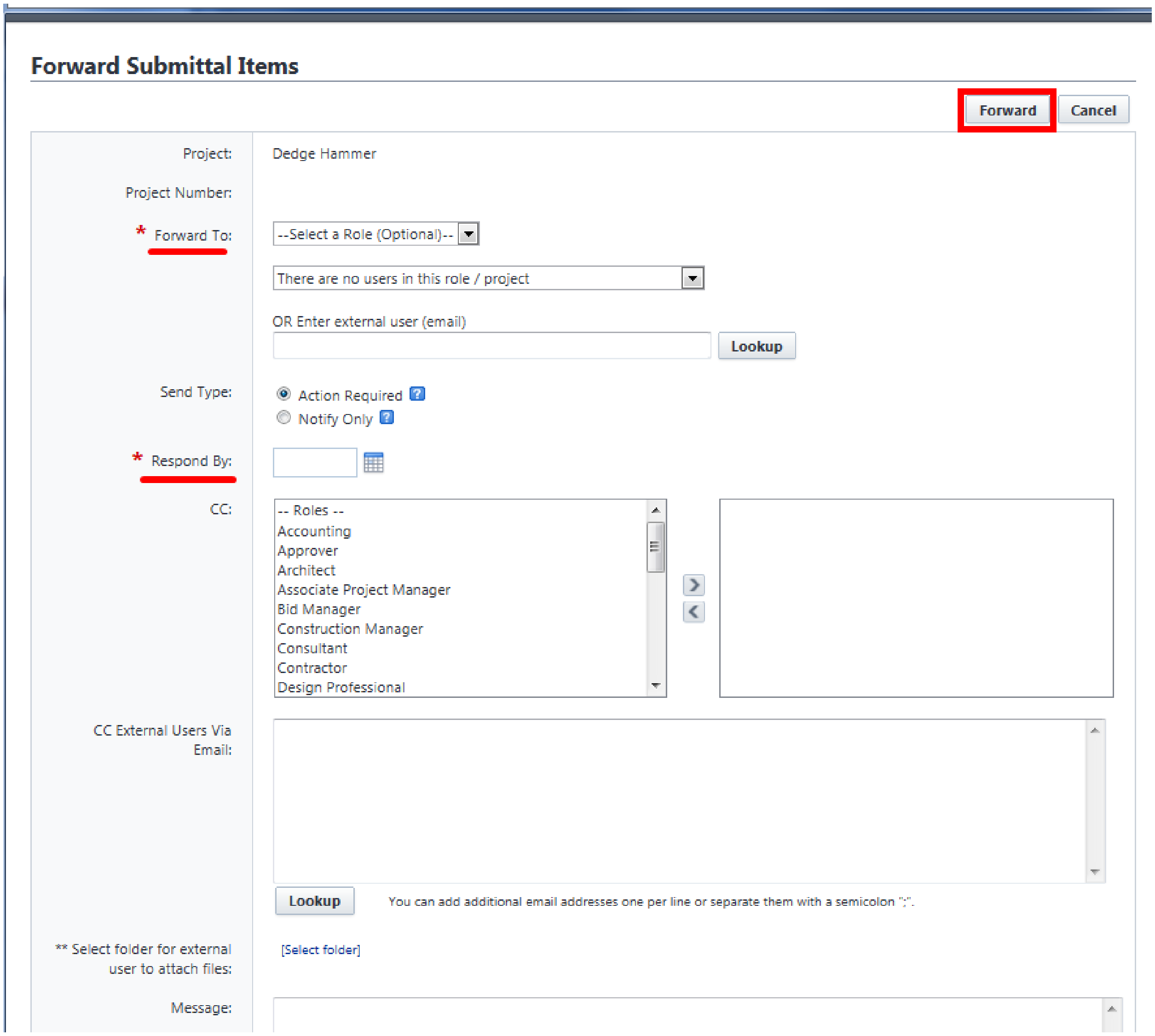
Sending to Consultants

From the Submittal Package Details screen:

1. *Select submittal package to be sent.*
2. *Check the specific item(s) you wish to forward to the consultant.*
3. *Click the **Forward** button.*



4. *If forwarding to an e-Builder User, select the user. If not, enter the email address of the person you are forwarding it to.*
5. *Type the message.*
6. *Click **Forward**.*

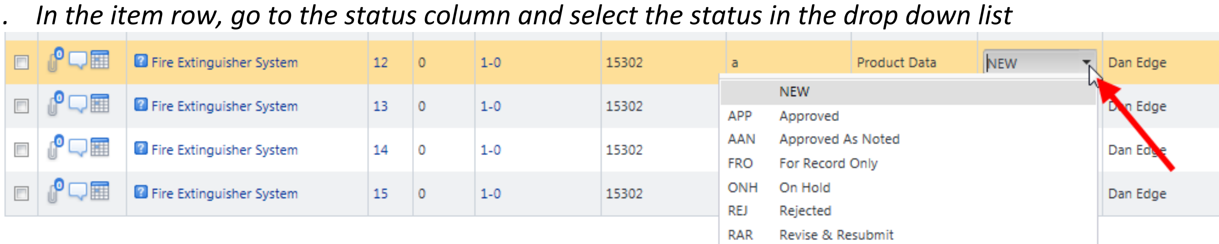


Updating the Status

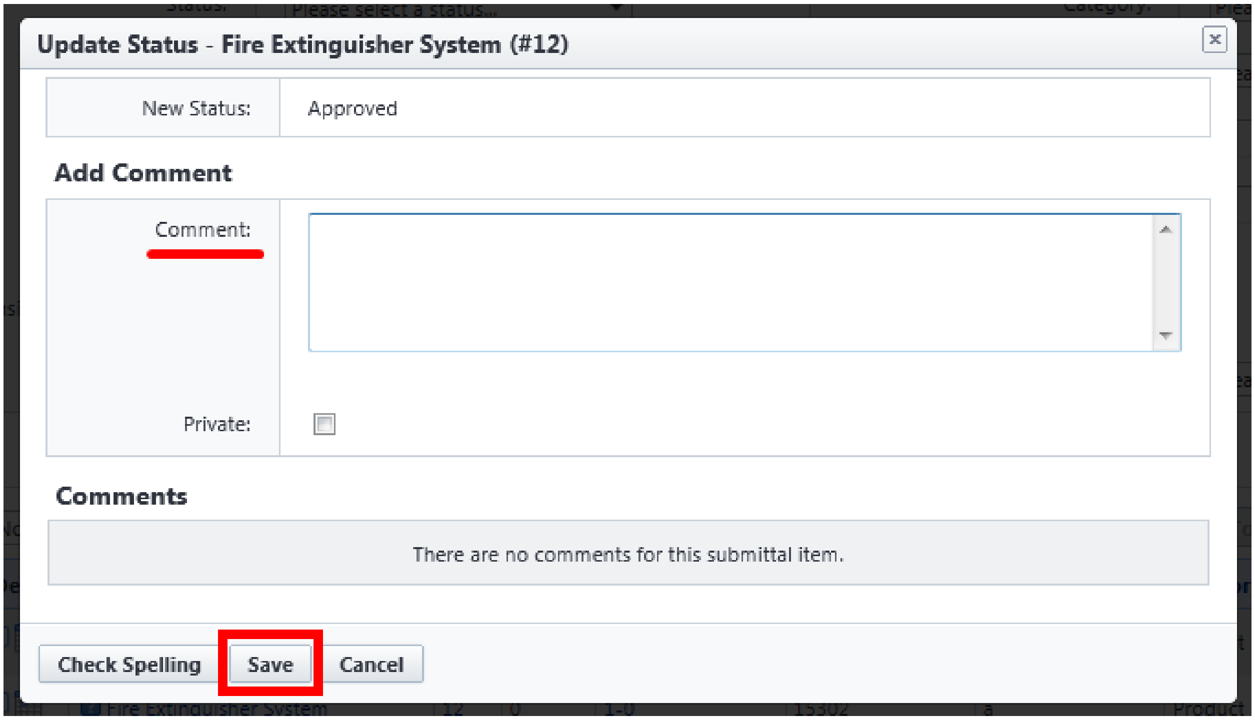
Once the submittal item has been reviewed, the Architect should update the status of the item.

From the Submittal Details screen:

1. *In the item row, go to the status column and select the status in the drop down list*



2. *A popup will appear where you can enter your comments regarding this item.*



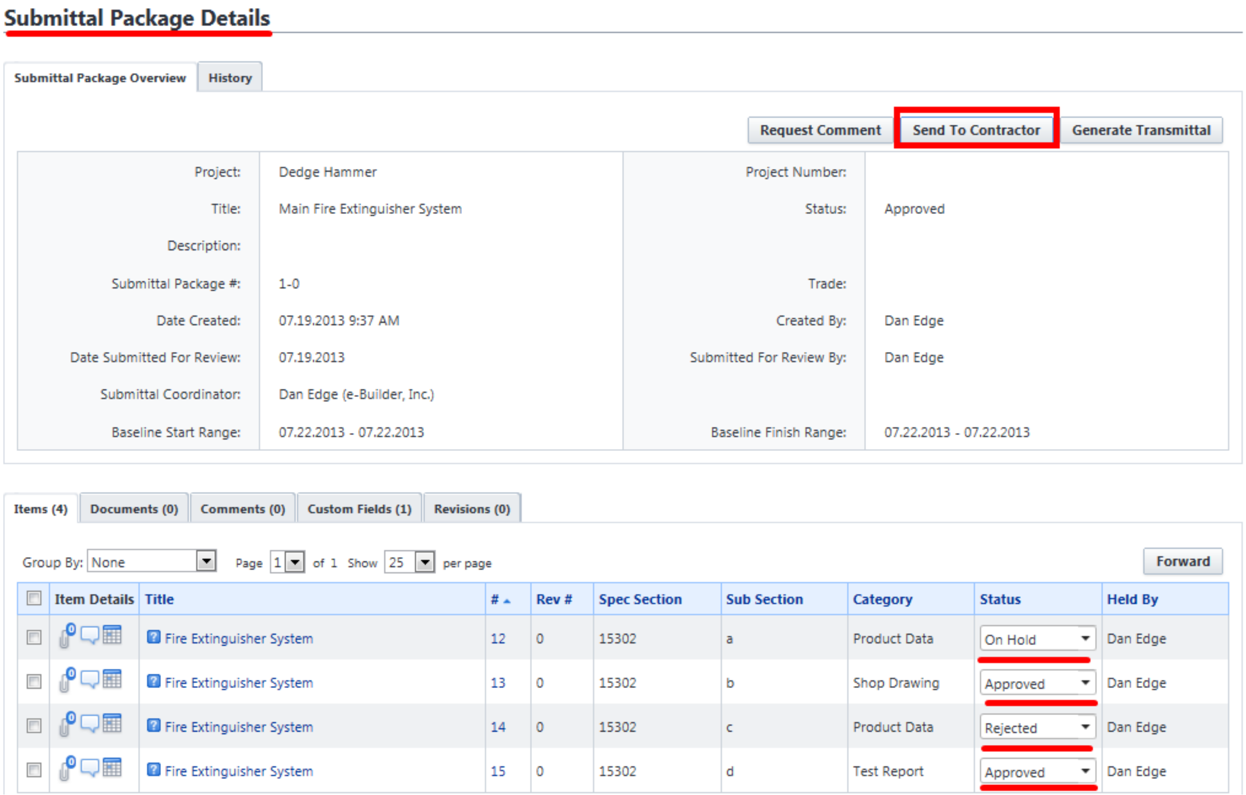
3. *Click **Save** to save the status and the note.*

Returning the Package to the Contractor

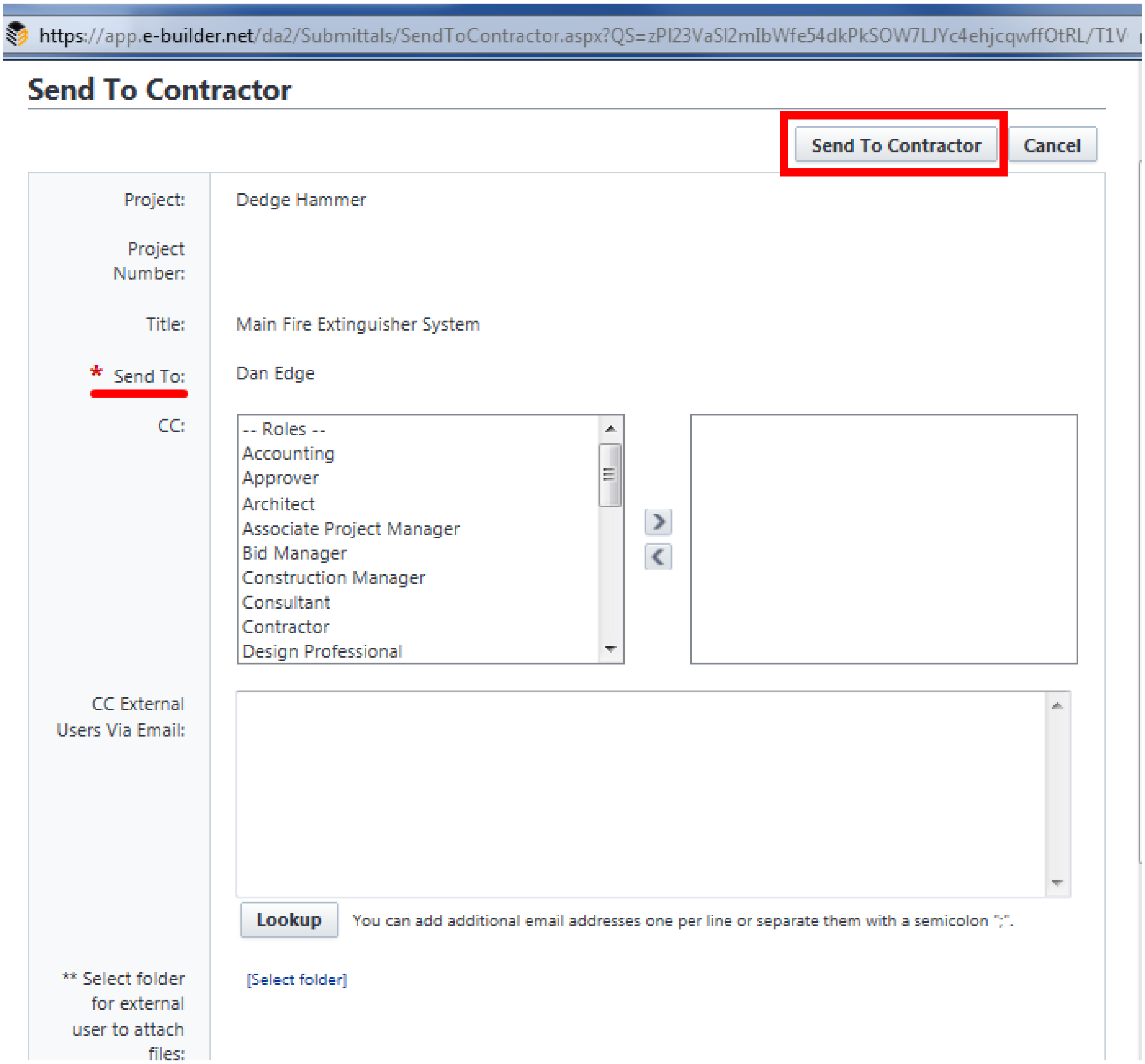
Once all the statuses have been updated the package is ready to be sent back to the Contractor.

From the Package Details screen:

1. *Click on the **Send to Contractor** button.*



2. *It will automatically list the Contractor that sent the package to you as your Send To person.*
3. *If you wish to copy any internal and external users you have the ability to do so.*
4. *Enter your message.*
5. *Click **Send to Contractor**.*


https://app.e-builder.net/da2/Submittals/SendToContractor.aspx?QS=zPI23VaSI2mIbWfe54dkPkSOW7LJYc4ehjcqwffOtRL/T1V
Send To Contractor
Send To Contractor
Cancel
Project:
Dedge Hammer
Project Number:
Title:
Main Fire Extinguisher System
* Send To:
Dan Edge
CC:
-- Roles --
Accounting
Approver
Architect
Associate Project Manager
Bid Manager
Construction Manager
Consultant
Contractor
Design Professional
CC External Users Via Email:
Lookup
You can add additional email addresses one per line or separate them with a semicolon ";".
** Select folder for external user to attach files:
[Select folder]

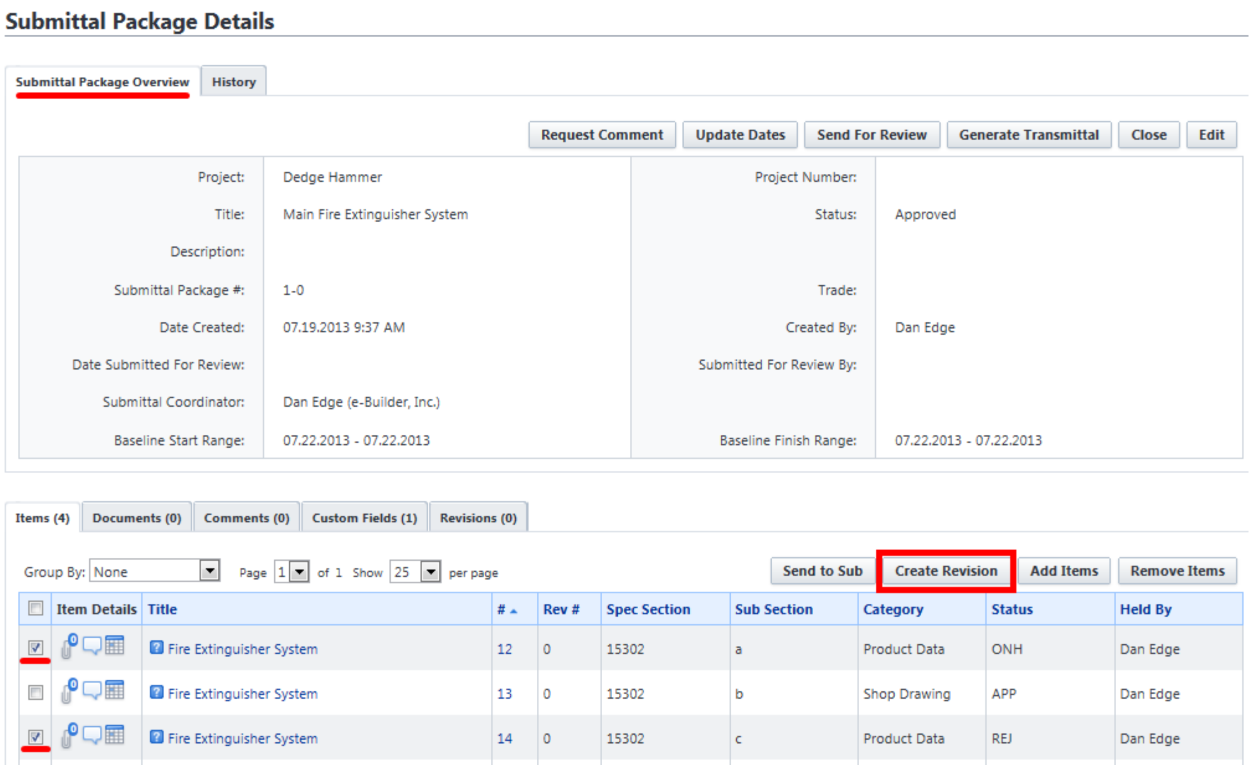
Completing the Package

Revise and Resubmit

If the status of an item is Revise and Resubmit, the Contractor will need to create a revision to the package to resubmit the items that have been requested.

From the Package Details screen:

1. *Select the item(s) to be revised.*
2. *Click the **Create Revision** button.*



3. *Click **Save** to save the Revision package.*
4. *Start the submittal processes over again.*

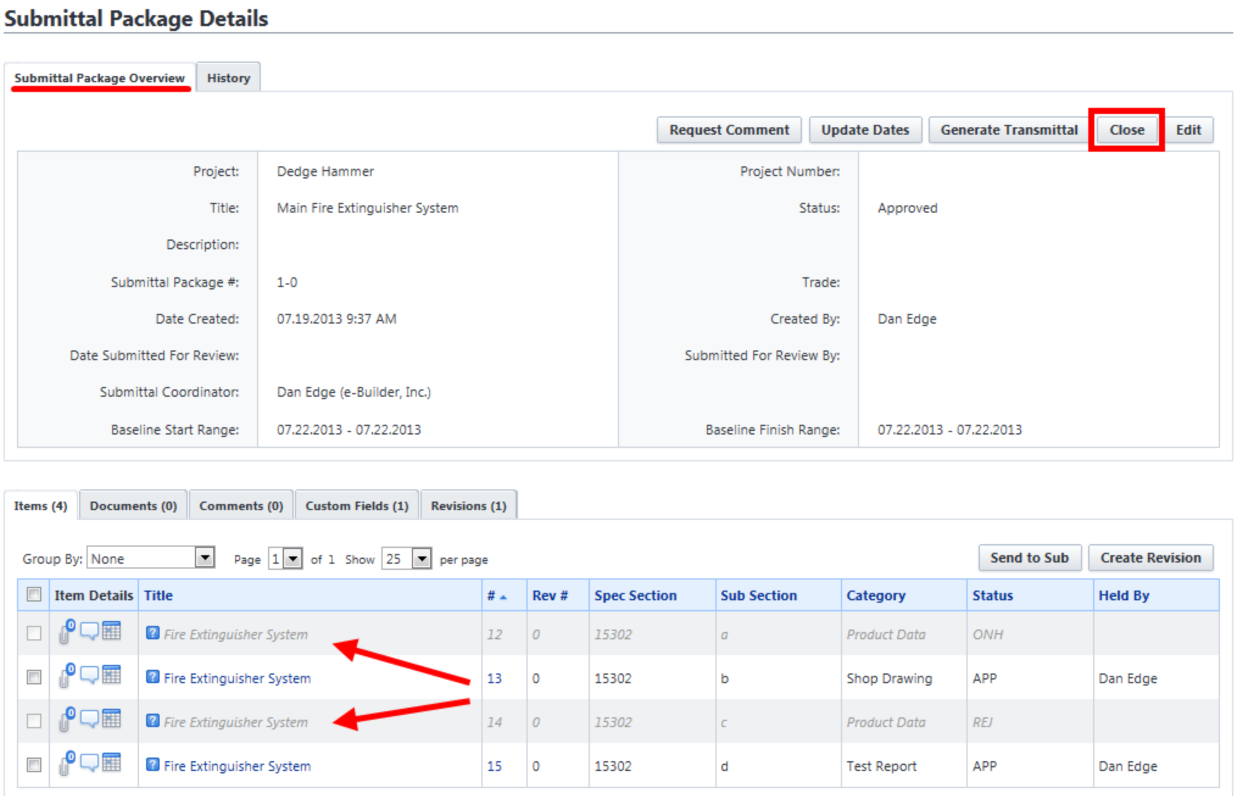
> Note: When a revision package is created, the last number in the package number is updated to reflect what revision number this revision is to that package.

Closing Items/Package

For items reviewed by Architect without need for revision, the Contractor can close items 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.

From the Package Details screen:

1. *Click the **Close** button.*



2. *Select **Continue** on the confirmation page. (Note: Here, the 2 submittal items that were moved to a revision package are grayed out)*

Self Tests

My Setup

- *Where and how can you change the email notification time zone*
- *How do you subscribe yourself to a report?*
- *How do you determine what projects you are associated with?*
- *How do you modify a task in a schedule template?*
- *How do you change your password?*

Home Module

- *How do you access the Home tab?*
- *What type of information does the Home screen provide?*
- *How do you change task views*
- *Can a general user change or add an announcement*
- *Can you access different modules from the Home screen?*

Documents

- *You are currently updating an Excel spreadsheet that other users also need to update. You don't want anyone to upload a new version before you are completed with your updates. How do you prevent them from doing so?*
- *You need to review a drawing that has two redlines associated with it. How do you view the drawing with the redline?*
- *I sent out a file from the document folder structure to the contractor. Is there any tracking history that the file has been sent?*
- *Three small firms need to see the building plans for your project, but you are out of licenses. How can you get them the building plans without sending them each of the documents?*
- *Where do you obtain the fax cover sheet for a folder?*

Forms

- *Explain in your own words the difference between a workflow and static form.*
- *Who can create new types of forms for your e-Builder account?*
- *There are several ways to know when a form has been placed in your court to take action on. Name two.*
- *How can you tell whether a form field is mandatory or optional to complete?*
- *How is attaching backup documentation to a form different if you are the author versus if you are the recipient of the form?*

Projects

- *How do you edit a project?*
- *How do you attach a document that resides on your computer to a project your computer to a project?*
- *How do you invite new users to a project?*
- *How do you send a message to a project participant?*
- *What can you do if a project participant goes on vacation for a week?*

Calendar

- *Create an event that takes place every Monday from 1:00 PM to 2:00 PM for the next two months.*
- *Can you create an event that is only visible by the invited attendees?*
- *Is it possible to invite attendees who are not e-Builder users?*
- *You need to see all events for all projects on an account that will take place within the next 30 days. How will you do this?*

Contacts

- *What is the difference between a company and a contact?*
- *Can there be two primary contacts for one company?*
- *What would you do if you had a large number of companies or contacts to add? Complete the steps necessary to add multiple companies/contacts.*

Reports

- *How do I modify an existing report to better fit my needs?*

- *Can you have a report sent to your e-mail in Microsoft Excel every Monday at 9:00 AM? If so, list the steps for setting it up.*

Dashboards

- *Executive Dashboards should include all the project budgets sorted by the largest project. How do you set this up?*

- *Project Managers would like to see all open forms that are past due, by user. Can you do this? If so, what would be the best way to show it in a dashboard?*

- *What types of charts are available?*