



User Training Guide – 2013

October 2013



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Getting Started

Download Tools

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

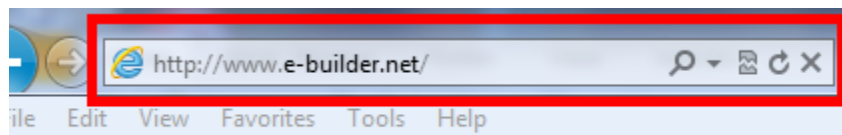
Also within the document module, users can redline documents and view drawing files without the need to have an AutoCAD viewer installed on the local workstation.

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.

e-Builder Downloads

e-Builder Plug-Ins	To download plug-ins to enhance your e-Builder user experience, click here .
Test Your Speed	To test your internet connect speed speed, click here . Then, select the location nearest you to run the test.

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

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 Install
	Redline/View Tool - Install to view and mark up AutoCAD drawings and picture files. Install
	Adobe Acrobat Reader - view PDF documents Install
	Navis Works Viewer - Enable the collaborative review and markup of BIM models through this integrated viewer Install

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.

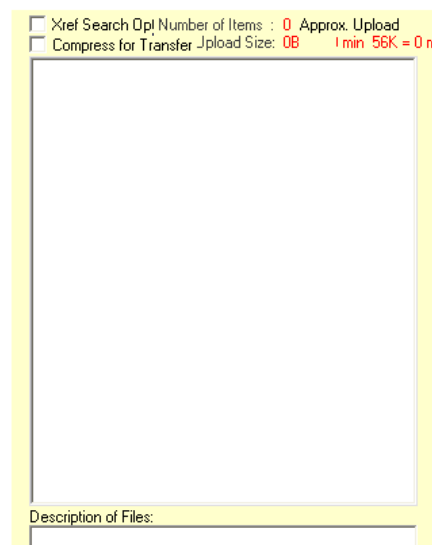
If this does not occur, check to make sure your IE settings are properly configured. [Click here](#) to find out more about the configuration settings.

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



Adobe Reader XI (11.0.03) (47.79 MB)

Your system: Windows 7, English

[Do you have a different language or operating system?](#)

 **McAfee®** | Security Scan Plus

Free! McAfee Security Scan Plus check the status of your PC security

Yes, install McAfee Security Scan Plus - optional (0.9 MB)

By clicking the Download now button, you acknowledge that you have read and agree to the [Adobe Software Licensing Agreement](#).

 **Download now**

Please note, depending on your settings, you may have to temporarily disable your antivirus software.



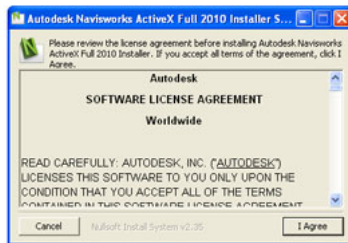
Navis Works Viewer Installation in Progress

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 agreement, 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



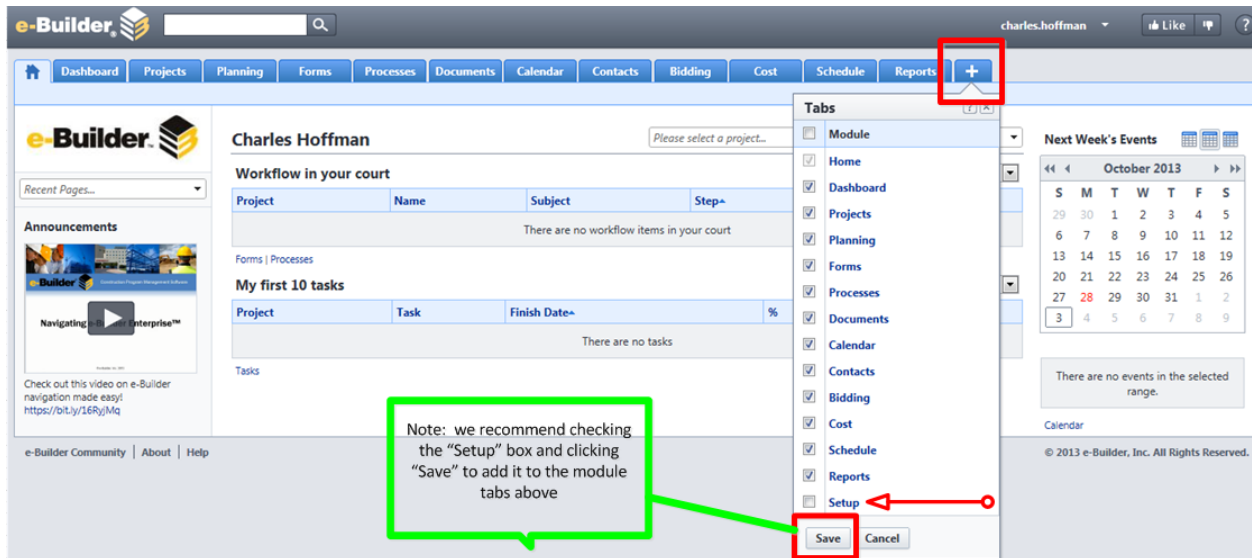
1. Please visit the optimization page before downloading these plugins to update your browser settings. [Go to optimization page](#)
2. Once your settings are updated, download these plugins to enhance your e-Builder Enterprise experience.

- ✓ 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

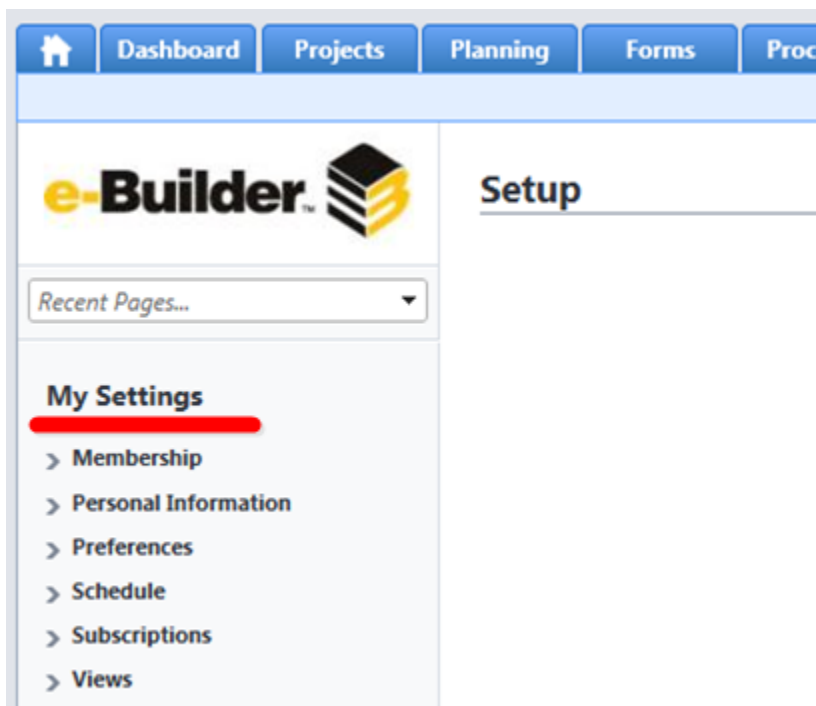
My Setup allows you to reference and customize information about your personal e-Builder account information and settings, including contact information, subscription notifications and personal settings such as your custom views and/or time zone settings.

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.

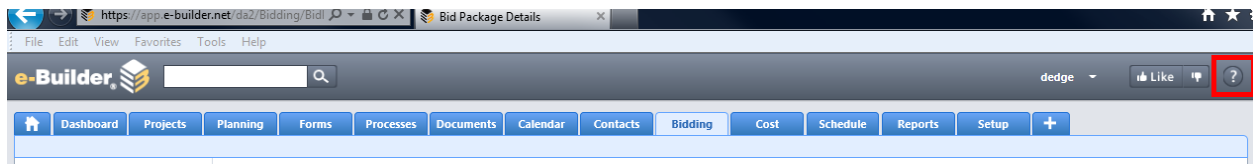




- **Membership:** The membership link allows you to view what roles or projects you are associated with.
- **Personal Information:** Here, the user can update profile information and change current password.
- **Preferences:** Here, the user can specify notification and interface settings. (Note: Default 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

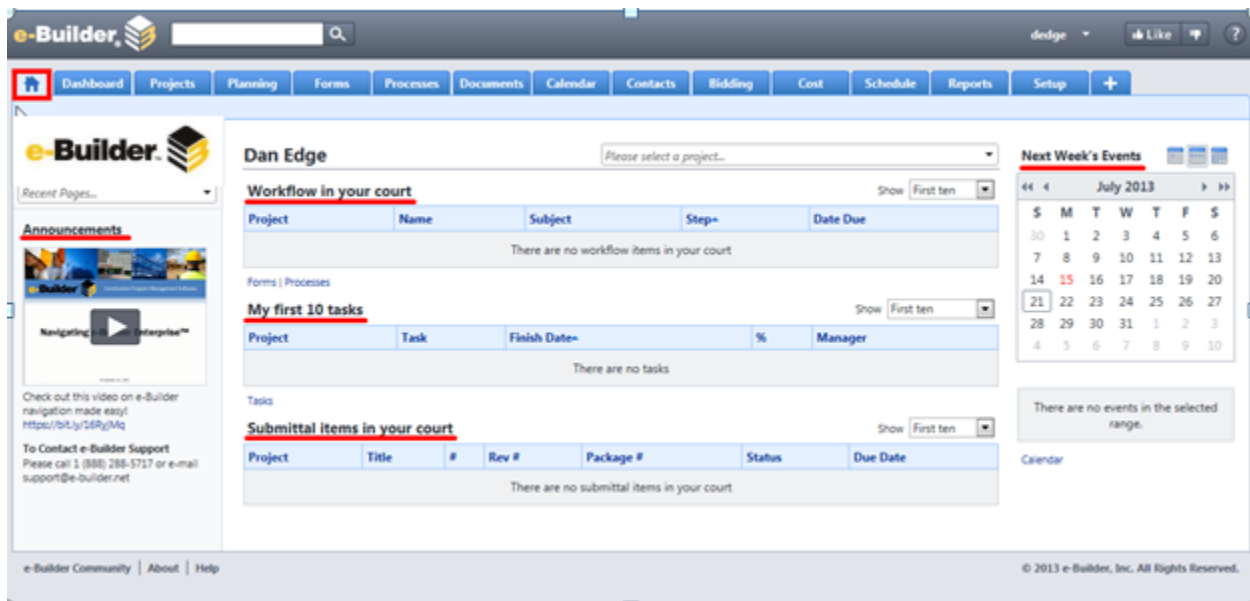
For more information regarding any e-Builder functions, refer to the Help bubble in the top right corner. The Help function will automatically jump to the relevant information based on your screen. Use the search/index function to search for information regarding any questions or problems you are confronted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

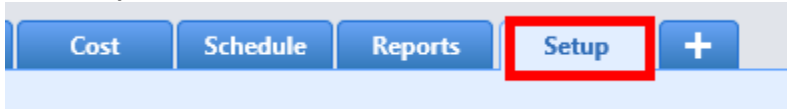
In e-Builder's Projects Module you can view, access, and update the basic project information for your projects. This includes key information such as the project address, status, custom fields, workflow settings, and calendar settings. You can produce meaningful Views, Reports, and Dashboards based 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.

The screenshot displays the e-Builder web application interface. At the top, there is a navigation bar with the e-Builder logo and a search bar. Below the navigation bar, a menu contains several options: Dashboard, **Projects** (highlighted with a red box), Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, and Setup. The main content area is titled 'Projects' and features a dropdown menu for 'Administrative Projects' and an 'Add Project' button. Below this, a table lists various project entries with columns for Project Name, City, State / Province, and Site Administrator.

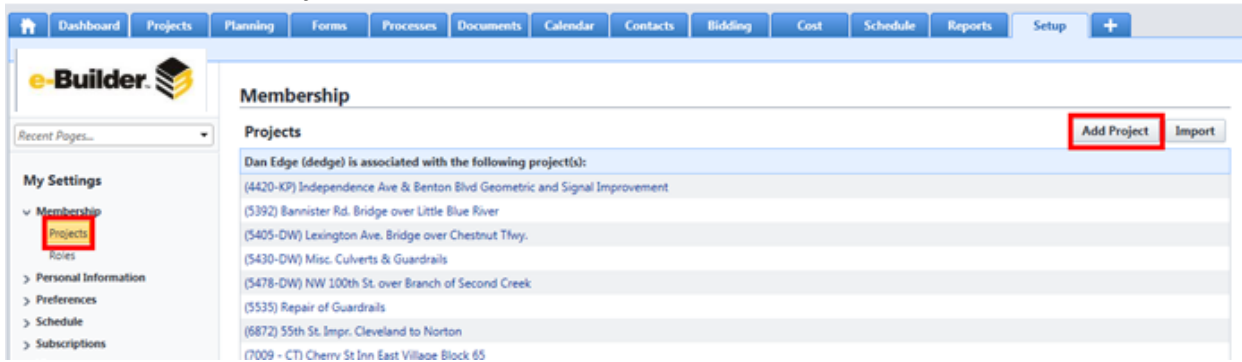
Project Name	City	State / Province	Site Administrator
*KCMO Integration			Implementation, e-Builder
*Process Testing			Implementation, e-Builder
*Template - City of Kansas City - Parks and Rec			Implementation, e-Builder
*Template - City of Kansas City - Public Works			Implementation, e-Builder
*Template - City of Kansas City - Water			Implementation, e-Builder
*Template - Permitting			Implementation, e-Builder
*Test - Chouteau Parkway	Kansas City	Mo	Implementation, e-Builder
*Training - City of Kansas City Sandbox			Implementation, e-Builder
Account Admin - City of Kansas City			Implementation, e-Builder

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.

Add Project

Details Check Spelling **Save** Cancel

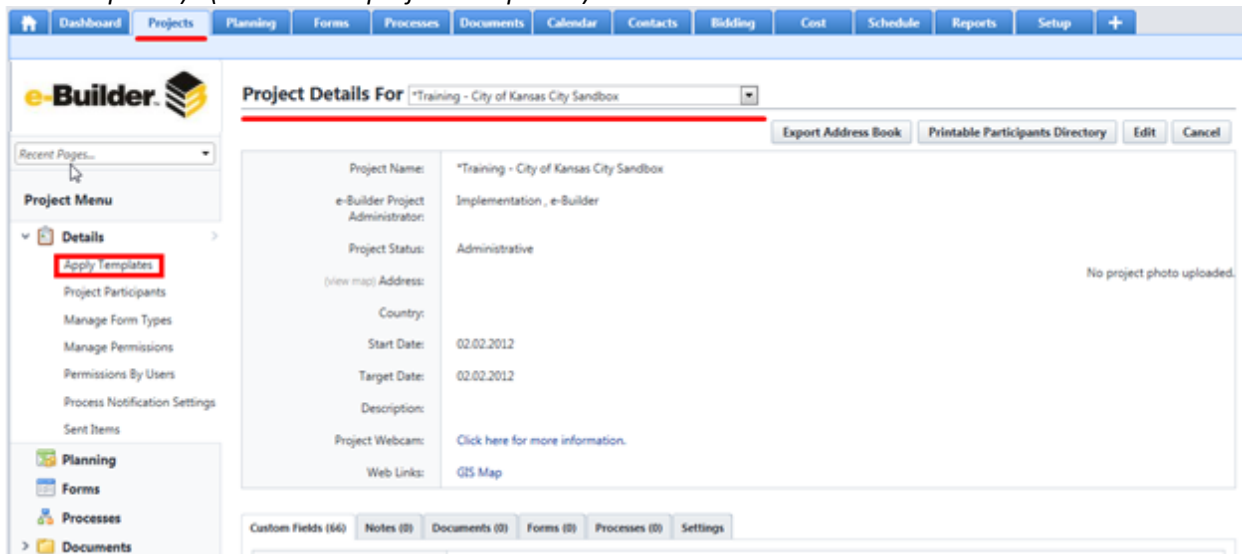
* Project Name:	<input type="text"/>
* e-Builder Project Administrator:	Abbott, Stephen <input type="text"/>
Description:	<input type="text"/>
* Project Status:	Select project status... <input type="text"/>
Project Photo:	<input type="text"/> <input type="button" value="Browse..."/>
Address:	<input type="text"/>
City:	<input type="text"/>
State / Province:	<input type="text"/>
Zip / Postal Code:	<input type="text"/>
Country:	<input type="text"/>
Start Date:	<input type="text"/> <input type="button" value="Calendar"/>
Target Date:	<input type="text"/> <input type="button" value="Calendar"/>
Project Webcam URL:	<input type="text"/>

Custom Fields (66)

Custom Fields

*

- 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)



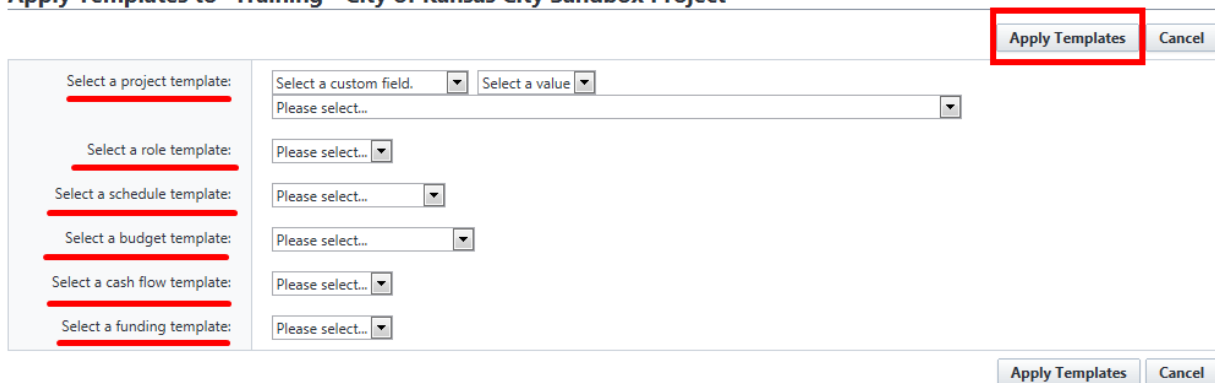
The screenshot shows the e-Builder interface with the 'Project Details' page for '*Training - City of Kansas City Sandbox'. The left-hand 'Project Menu' has 'Apply Templates' highlighted with a red box. The main content area displays project information:

- Project Name: *Training - City of Kansas City Sandbox
- e-Builder Project Administrator: Implementation, e-Builder
- Project Status: Administrative
- (view map) Address: No project photo uploaded.
- Country:
- Start Date: 02.02.2012
- Target Date: 02.02.2012
- Description:
- Project Webcam: [Click here for more information.](#)
- Web Links: [GIS Map](#)

Buttons at the top right include 'Export Address Book', 'Printable Participants Directory', 'Edit', and 'Cancel'. At the bottom, there are tabs for 'Custom Fields (64)', 'Notes (0)', 'Documents (0)', 'Forms (0)', 'Processes (0)', and 'Settings'.

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

Apply Templates to *Training - City of Kansas City Sandbox Project



The 'Apply Templates' dialog box is shown with the 'Apply Templates' button at the top right highlighted with a red box. The dialog contains the following fields:

- Select a project template: [Please select...]
- Select a role template: [Please select...]
- Select a schedule template: [Please select...]
- Select a budget template: [Please select...]
- Select a cash flow template: [Please select...]
- Select a funding template: [Please select...]

Buttons at the bottom include 'Apply Templates' and 'Cancel'.

- 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.



Manage Users

*Training - City of Kansas City Sandbox Add New User

Available Users

Filter Users

Last Name starts with

Select a custom field Select a value

Filter

- Abbott, Stephen -- kcmo.sabbott -- City of Kansas City Missouri
- Akula, Sudhakar -- kcmo.sakula -- City of Kansas City Missouri
- Al-ani, Basil -- ba0480 -- KCMO
- Al-Ani, Basil -- kcmo.ba0480 -- City of Kansas City Missouri**
- Alemifar, Masood -- kcmo.malemifar -- City of Kansas City Missouri
- Allen, Richard -- kcmo.rlallen -- City of Kansas City Missouri
- Allen, Sean -- kcmo.sallen -- City of Kansas City Missouri**
- Ambriz, Martin -- kcmo.mambriz -- City of Kansas City Missouri**
- Andersen, Troy -- tandersen10 -- KCMO
- Atkinson, Bridgette -- kcmo.batkin -- City of Kansas City Missouri

Removed Users

Notify users removed from site

Project Users

Implementation, e-Builder -- eb@City of Kansas City Sandbox -- e-Builder, Inc

Notify users added to site

Include username and password

Note: You must click the save button in order to apply the changes you have made.

Save Cancel

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**.

Project Name	City	State / Province	Site Administrator
*KCMO Integration			Implementation, e-Builder
*Process Testing			Implementation, e-Builder
*Template - City of Kansas City - Parks and Rec			Implementation, e-Builder
*Template - City of Kansas City - Public Works			Implementation, e-Builder
*Template - City of Kansas City - Water			Implementation, e-Builder
*Template - Permitting			Implementation, e-Builder
*Test - Chouteau Parkway	Kansas City	Mo	Implementation, e-Builder
*Training - City of Kansas City Sandbox			Implementation, e-Builder
Account Admin - City of Kansas City			Implementation, e-Builder

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

Project Details For *Training - City of Kansas City Sandbox

Export Address Book Printable Participants Directory Edit Cancel

Project Name:	*Training - City of Kansas City Sandbox
e-Builder Project Administrator:	Implementation , e-Builder
Project Status:	Administrative
(view map) Address:	No project photo uploaded.
Country:	
Start Date:	02.02.2012
Target Date:	02.02.2012
Description:	
Project Webcam:	Click here for more information.
Web Links:	GIS Map

Custom Fields (66) Notes (0) Documents (0) Forms (0) Processes (0) Settings

PeopleSoft Project Number(s):

Editing Custom Fields

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

Project Details For *Training - City of Kansas City Sandbox

Export Address Book Printable Participants Directory **Edit** Cancel

Project Name:	*Training - City of Kansas City Sandbox		
e-Builder Project Administrator:	Implementation , e-Builder		
Project Status:	Administrative		
(view map) Address:	No project photo uploaded.		
Country:			
Start Date:	02.02.2012		
Target Date:	02.02.2012		
Description:			
Project Webcam:	Click here for more information.		
Web Links:	GIS Map		

Custom Fields (66) Notes (0) Documents (0) Forms (0) Processes (0) Settings

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

Edit Project

Details Check Spelling **Save** Cancel

* Project Name:	<input type="text" value="*Training - City of Kansas City Sandbox"/>
* e-Builder Project Administrator:	<input type="text" value="Implementation, e-Builder"/>
Description:	<input type="text"/>
* Project Status:	<input type="text" value="Administrative"/>

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.

Project Participants For *Training - City of Kansas City Sandbox

Groups
 Administrators
 Members

Roles
 Acquisition Lead
 Acquisition Reviewer
 Acquisition Specialist
 Administrative Support
 Appraisal Consultant
 Assistant City Manager
 Assistant Director
 Assistant Procurement Manager
 Board Member

Members

First Name:
 Last Name:
 Username:
 Company:
 Custom Field:

Filter Clear

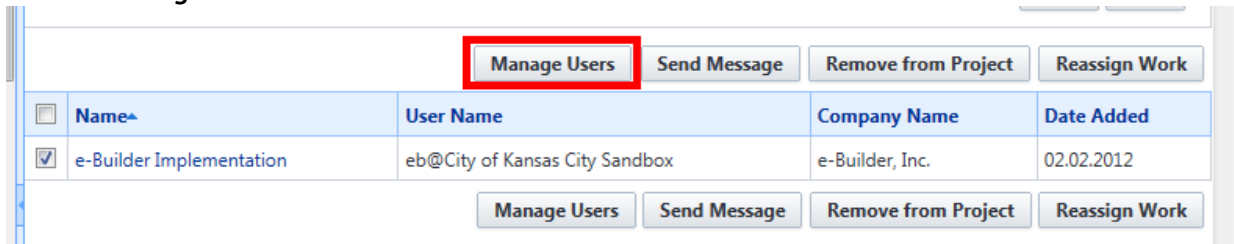
Manage Users Send Message Remove from Project Reassign Work

Name	User Name	Company Name	Date Added
<input type="checkbox"/> e-Builder Implementation	eb@City of Kansas City Sandbox	e-Builder, Inc.	02.02.2012

Manage Users Send Message Remove from Project Reassign Work

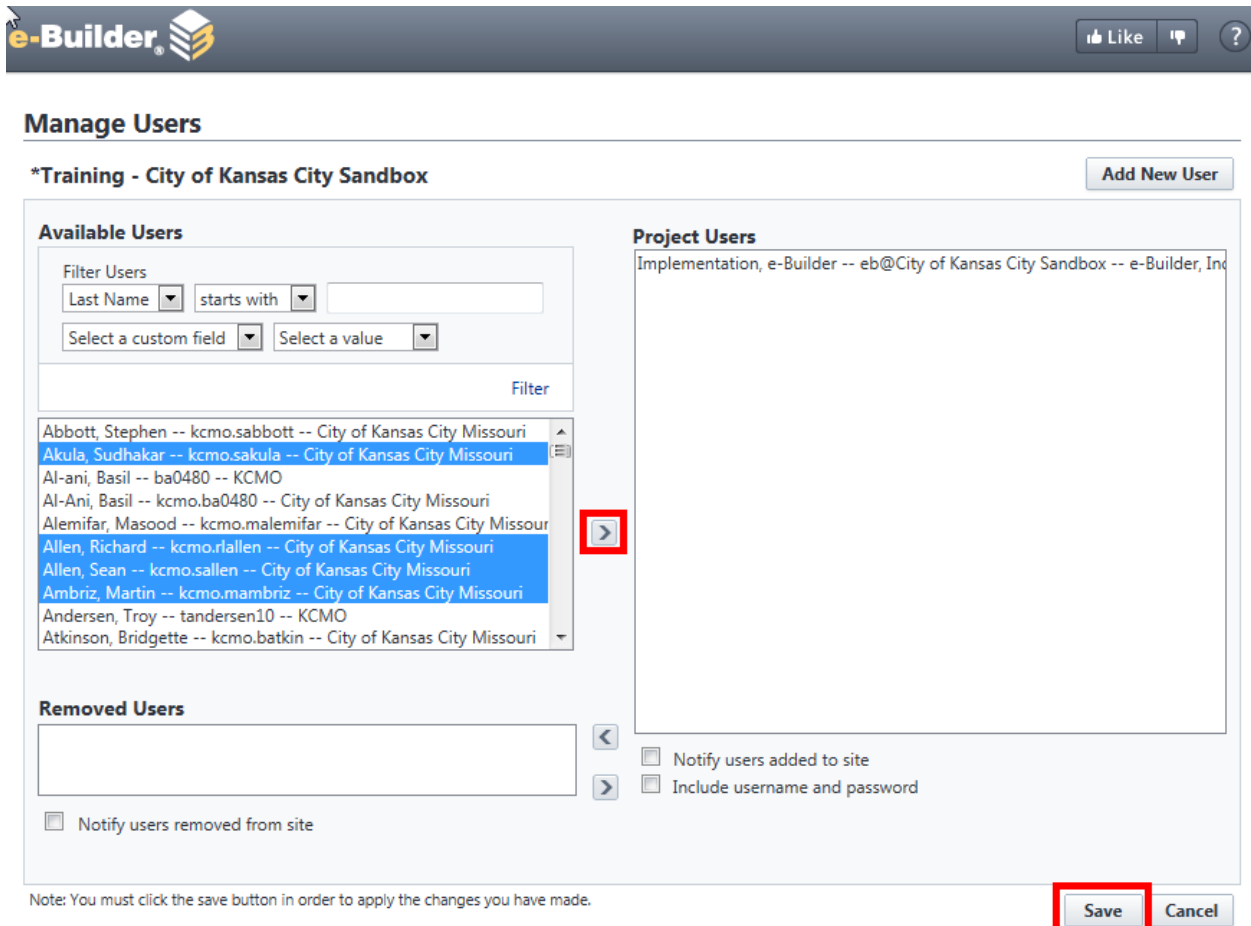
Manage Users

1. Click **Manage Users**.



Name	User Name	Company Name	Date Added
<input checked="" type="checkbox"/> e-Builder Implementation	eb@City of Kansas City Sandbox	e-Builder, Inc.	02.02.2012

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)



Manage Users

*Training - City of Kansas City Sandbox Add New User

Available Users

Filter Users

Last Name starts with

Select a custom field Select a value

Filter

- Abbott, Stephen -- kcmo.sabbott -- City of Kansas City Missouri
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- Al-Ani, Basil -- kcmo.ba0480 -- City of Kansas City Missouri
- Alemifar, Masood -- kcmo.malemifar -- City of Kansas City Missouri
- Allen, Richard -- kcmo.rallen -- City of Kansas City Missouri
- Allen, Sean -- kcmo.sallen -- City of Kansas City Missouri
- Ambriz, Martin -- kcmo.mambriz -- City of Kansas City Missouri
- Andersen, Troy -- tandersen10 -- KCMO
- Atkinson, Bridgette -- kcmo.batkin -- City of Kansas City Missouri

Removed Users

Notify users removed from site

Project Users

Implementation, e-Builder -- eb@City of Kansas City Sandbox -- e-Builder, Inc

>

Notify users added to site

Include username and password

Note: You must click the save button in order to apply the changes you have made.

Save Cancel

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)

<input type="checkbox"/>	Name	User Name	Company Name	Date Added
<input checked="" type="checkbox"/>	e-Builder Implementation	eb@City of Kansas City Sandbox	e-Builder, Inc.	02.02.2012

3. Fill in the Subject and Body fields.

Email Users

To: e-Builder Implementation <implementation@e-builder.net>

CC:

Subject:

Body:

Include Welcome Message

Send username and password notification

Wellcome message and username/password will only apply to users and will not be sent to contacts.

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.

<input type="checkbox"/>	Name^	User Name	Company Name	Date Added
<input checked="" type="checkbox"/>	e-Builder Implementation	eb@City of Kansas City Sandbox	e-Builder, Inc.	07.15.2013

Buttons: Manage Users, Send Message, **Remove from Project**, Reassign Work

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**.

<input type="checkbox"/>	Name^	User Name	Company Name	Date Added
<input checked="" type="checkbox"/>	e-Builder Implementation	eb@City of Kansas City Sandbox	e-Builder, Inc.	07.15.2013

Buttons: Manage Users, Send Message, Remove from Project, **Reassign Work**

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

Reassign Work Items for e-Builder Implementation on *Training - City of Kansas City Sandbox

Open Work Items **Reassign** Cancel

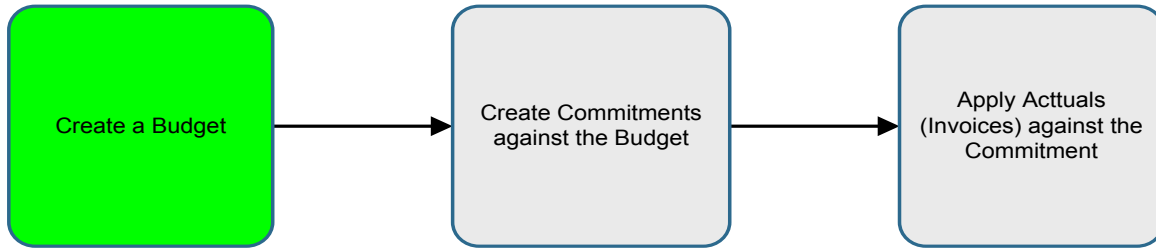
<input type="checkbox"/>	Work Item Description^	User's Involvement
There are no work items that can be reassigned for this user.		

Buttons: Reassign, Cancel

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

Cost Module

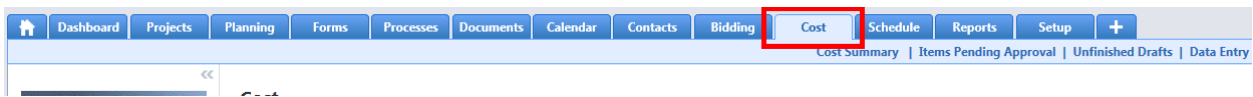
The e-Builder cost module helps manage the cost management processes that owners, general contractors, and other industry participants go through in construction. It standardizes the tracking of costs across an entire program. The cost module also eases the burden of reporting on Budgets, Change Orders, 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.



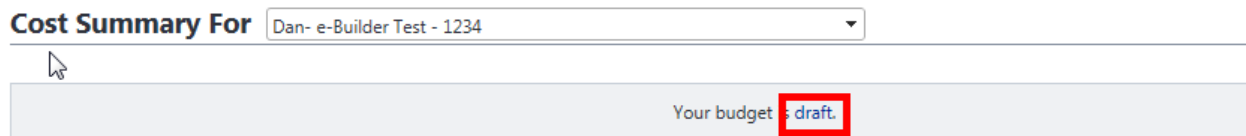
Creating a Budget

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

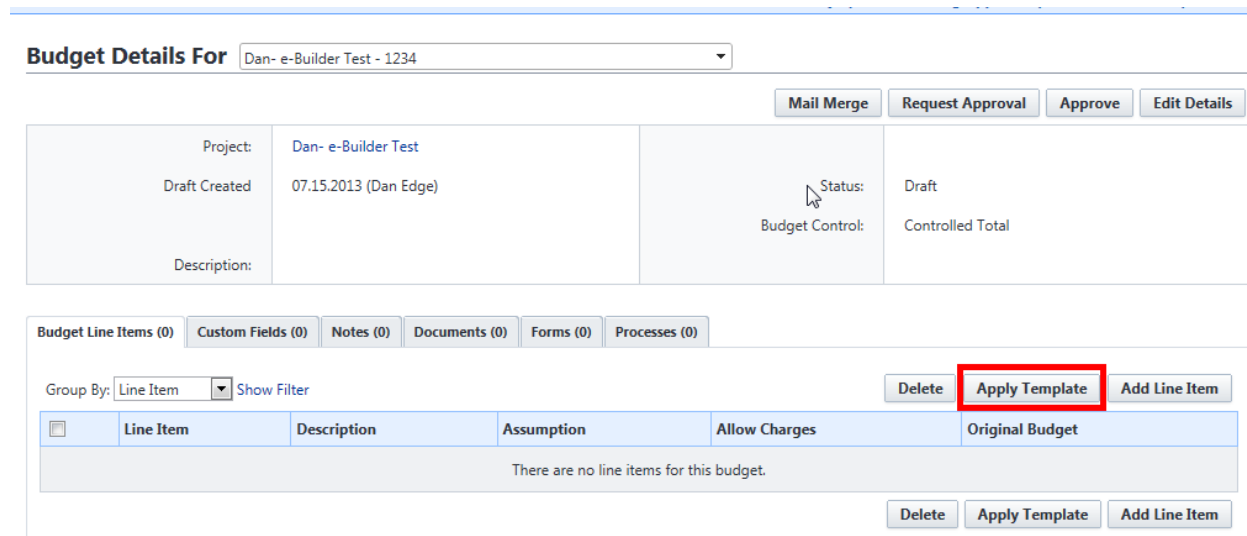
1. Go to the **Cost** tab.



2. Select the project you need to create the budget for.
3. Click 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.



Apply Template

Budget Templates					Cancel
Name	Status	Description	# of Line Items	Date Created	
Standard Budget Template	Active		46	07.02.2013	Cancel

6. Press **Continue** to confirm.

70.020	Indirect Charges	✓
80.010	Signage	✓
90.010	Miscellaneous	✓
99.010	Contingency	✓
99.020	Escalation	✓

Continue Cancel

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

Budget Details For Dan- e-Builder Test - 1234

Mail Merge Request Approval Approve **Edit Details**

Project:	Dan- e-Builder Test	Status:	Draft
Draft Created:	07.15.2013 (Dan Edge)	Budget Control:	Controlled Total
Description:			

Budget Line Items (46) Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0)

Group By: Line Item Show Filter Delete Apply Template Add Line Item

1 2 3 4 5 Show 10 46 items in 5 pages

Line Item	Description	Assumption	Allow Charges	Original Budget
00.010	Direct Charges		✓	0.00
00.020	Indirect Charges		✓	0.00

Recalculate All

Line Item	Description	Assumption	Formula	Allow Charges	Original Budget
00.010	Direct Charges		Add	✓	0.00
00.020	Indirect Charges		Add	✓	0.00
10.010	Direct Charges		Add	✓	0.00
10.020	Indirect Charges		Add	✓	0.00
10.030	Preliminary Design/Planning		Add	✓	0.00

*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.

Edit Budget Details

Project Name:	Dan- e-Builder Test	Status:	Draft
Draft Created:	07.15.2013 (Dan Edge)		

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

Budget Details For Dan- e-Builder Test - 1234

Budget Changes

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

[Cost Summary](#) | [Items Pending Approval](#) | [Unfinished Drafts](#) | [Data Entry](#)

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.

Recent Pages...

Project Menu

- > Details
- > Planning
- > Forms
- > Processes
- > Documents
- > Schedule
- Cost**
 - Cost Summary
 - Funding Sources
 - Budget Details
 - Cash Flow

Cost Summary For Dan- e-Builder Test - 1234

Your budget is draft.

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

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
0.00	0.00	0.00	0.00	0.00

Budget Line Items (46)

Group By: Line Item

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

Budget Line Items (46) Budget Changes (0) Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0)

Show: All Show Filter Add Change

#	Description	Reason For Change	Applied To	Status	Date Of Change	Change
---	-------------	-------------------	------------	--------	----------------	--------

6. Fill out the budget change information.

Add Change Details

Save and Add All Line Items
Save and Add Items One at a Time
Cancel

Project Name: Dan- e-Builder Test	Status: Draft
* Budget Change Number: 001	* Date Of Change: 07.15.2013
* Reason Code: Design Change (Changes)	
* Description: Need more COConcrete	

Custom Fields

- Click on the **Save & Add All 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.
- Confirm change by clicking **Continue**.

Add Change Details

Confirm Add All Budget Items

Are you sure you want to add all budget line items to the change?

Continue
Go Back

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

Edit Change Details

Save Cancel

Project Name: Dan- e-Builder Test	Status: Draft
* Budget Change Number: 005	* Date Of Change: 07.15.2013
* Reason Code: Field Condition (Changes)	
* Description: Stuff	

Budget Change Items Recalculate All

#	Description	Budget Line Item	Current Budget Amount	Projected Commitments	Formula	Change Amount	Net Budget Amount
001	Direct Charges	00.010	0.00	0.00	Add	0.00	0.00



** 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.

Budget Change Details

Project:	Dan- e-Builder Test	Status:	Draft
Change Number:	003	Date of Change:	07.15.2013
Reason Code:	Design Change	Created:	07.15.2013 (Dan Edge)
Applies To:	Approved Changes		
Description:	Need more glass for west wing Operating Room		

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
0.00	0.00	0.00	0.00	0.00

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.

Cost	10.060	Survey and Geotechnical	0.00	0.00	0.00	0.00	0.00
Cost Summary	20.010	Direct Charges	0.00	0.00	0.00	0.00	0.00
Funding Sources	20.020	Indirect Charges	0.00	0.00	0.00	0.00	0.00
Budget Details	20.030	Design Professional	0.00	0.00	0.00	0.00	0.00

2. Select **Budget Changes**.

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
0.00	0.00	0.00	0.00	0.00

3. Select specific Budget Change.

4. Use the tabs to select type of attachment and **Attach** button to attach appropriate item.



Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
0.00	0.00	0.00	0.00	0.00

Budget Change Items (0) Custom Fields (0) **Notes (0)** **Documents (0)** Forms (0) Processes (0)

Attach Documents Remove

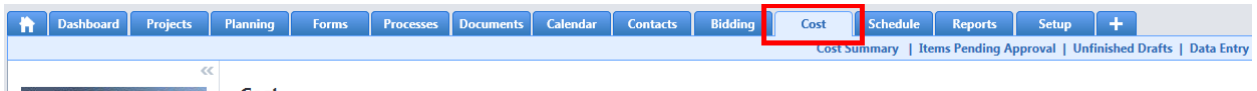
File Name	Attached By	Date Attached
There are no documents attached to this budget change.		

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.

Line L.	Description	A Original Budget *	B Approved Budget Changes *	C A + B Current Budget *	D Pending Budget Changes *	E Projected Budget Changes *	F C + D + E Projected Budget
00.010	Direct Charges	0.00	0.00	0.00	0.00	0.00	0.00
00.020	Indirect Charges	0.00	0.00	0.00	0.00	0.00	0.00
10.010	Direct Charges	0.00	0.00	0.00	0.00	0.00	0.00
10.020	Indirect Charges	0.00	0.00	0.00	0.00	0.00	0.00
10.030	Preliminary Design/Planning	0.00	0.00	0.00	0.00	0.00	0.00
10.040	Environmental Assessment	0.00	0.00	0.00	0.00	0.00	0.00
10.050	Site Selection	0.00	0.00	0.00	0.00	0.00	0.00
10.060	Survey and Geotechnical	0.00	0.00	0.00	0.00	0.00	0.00
20.010	Direct Charges	0.00	0.00	0.00	0.00	0.00	0.00
20.020	Indirect Charges	0.00	0.00	0.00	0.00	0.00	0.00
20.030	Design Professional	0.00	0.00	0.00	0.00	0.00	0.00
20.040	Environmental Services	0.00	0.00	0.00	0.00	0.00	0.00
20.050	Special Services	0.00	0.00	0.00	0.00	0.00	0.00
30.010	Direct Charges	0.00	0.00	0.00	0.00	0.00	0.00
30.020	Indirect Charges	0.00	0.00	0.00	0.00	0.00	0.00

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



Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
0.00	0.00	0.00	0.00	0.00

Show: All Show All Show Filter

Add Commitment

#	Description	Company	Date	Status	Commitment Type	Commitment Amount	Current Commitment	Projected Commitment
There are no commitment items for this selection.								

5. Enter required commitment information.

Add Commitment

Commitment Overview

Project: Dan- e-Builder Test

* Commitment Type: Select one...

* Commitment Number: 001

* Commitment Control: ControlledByCommitmentItem

* Unit Cost Options: Lump Sum Amount

* Description:

Status: Draft

* Company:

Company Number:

Contact:

Other Details

Commitment Date:

Scope of work:

Notice to Proceed Date:

* Default Retainage Percent: 0.00

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

Commitment Items

Item #	Budget Line Item	Description	Current Budget	Retainage Percent	Amount	Allowance	Custom Field(s)	
001	Please Select A Line Item	<input type="text"/>		0.00	<input type="text"/>	<input type="checkbox"/>		<input type="button" value="Add Item"/>
Total						0.00		

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

Commitment Items

Item #	Budget Line Item	Description	Current Budget	Retainage Percent	Amount	Allowance	Custom Field(s)	
001	Please Select A Line Item	<input type="text"/>		0.00	<input type="text"/>	<input type="checkbox"/>		<input type="button" value="Add Item"/>
Total						0.00		

Commitment Custom Fields

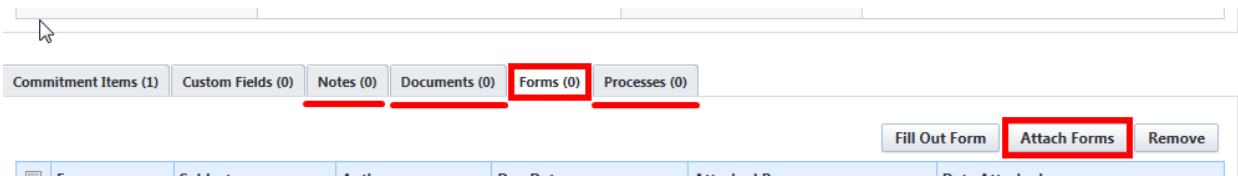
There are no commitment custom fields.

Save

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).

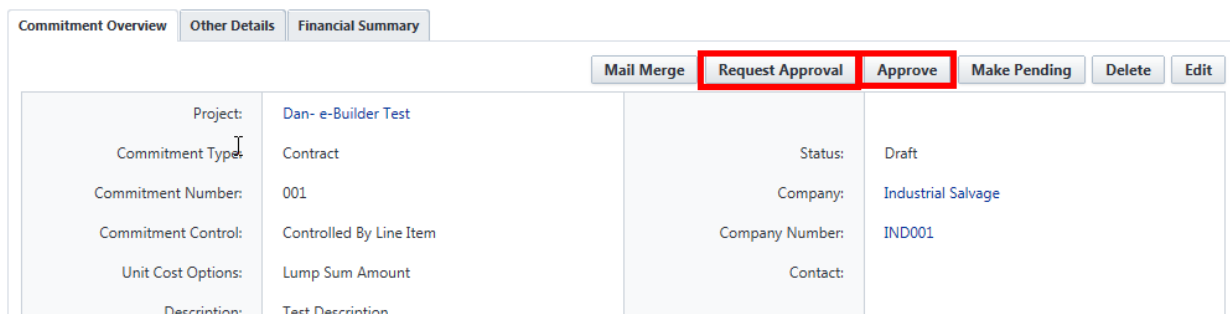


- Click on the center tabs and attach documents, forms, notes, or processes if needed by clicking **Attach** button



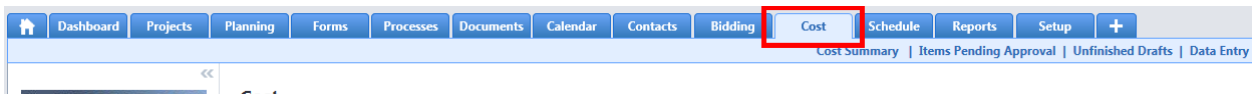
- Depending on your permissions click either **Request Approval**, or **Approve**.

Commitment Details

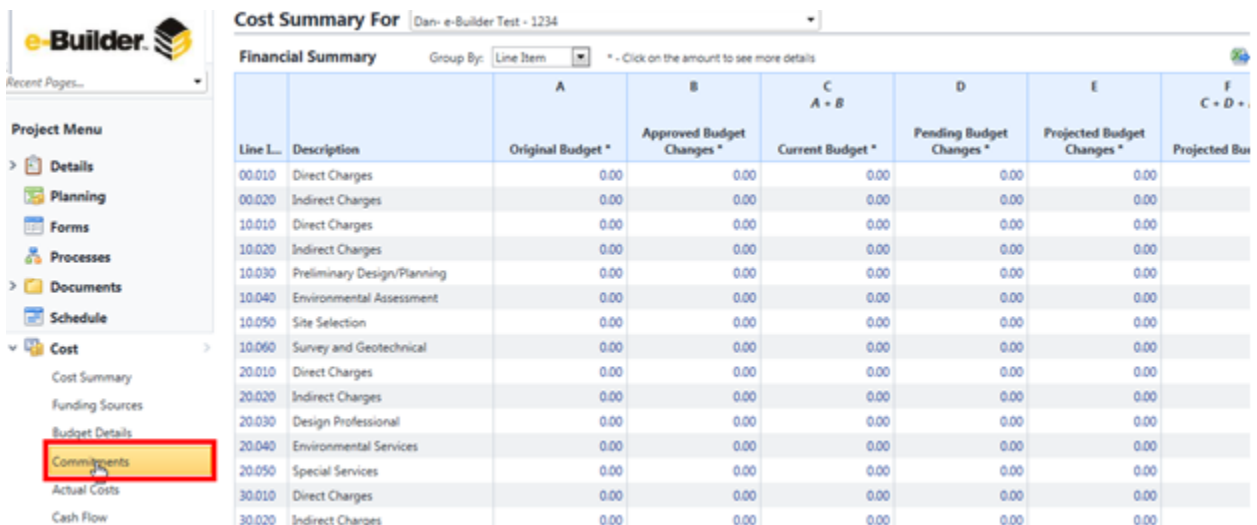


Commitment Changes

- Go to the **Cost** tab.



- Select the project you need to enter a commitment change for.
- 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.

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
0.00	0.00	0.00	0.00	0.00

Show: All Show All Show Filter

#	Description	Company	Date	Status	Commitment Type	Commitment Amount	Current Commitment	Projected Commitment
001	Test Description	Industrial Salvage	07.15.2013	Draft	Contract	10.00		
Totals						10.00	0.00	0.00

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

Commitment Items (1) **Commitment Changes (0)** Actual Costs (0) Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0)

Show Filter

Item #	Budget Line Item	Description	Current Budget	Original Commitment Amount	Current Commitment	Projected Commitment	Current Retainage Held	Actuals Approved	Custom Field(s)
001	10.050	Site Selection	0.00	0.00	0.00	0.00	0.00	0.00	

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

Commitment Items (1) **Commitment Changes (0)** Actual Costs (0) Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0)

Show: All

#	Description	Reason For Change	Applies To	Status	Date Of Change	Change Amount
There are no commitment changes.						

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

Add Change Details

Project Name:	Dan- e-Builder Test	Status:	Draft
* Commitment:	001 - Test Description	* Reason Code:	Design Change (Changes)
* Commitment Change Number:	001		
* Date Of Change:	07.15.2013		
Description:			

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.)

Add Commitment Change Item

Save & Add New **Save** Cancel

Project Name:	Dan- e-Builder Test		
* Commitment Change Item Number:	001	Commitment Change Number:	001
* Please choose:	<input checked="" type="radio"/> Select Existing Commitment Item Select Commitment Item..		
	<input type="radio"/> Create New Commitment Item Please select a budget line item...		
* Description:			
* Change Amount:			
	Current Commitment Amount:		

Commitment Item Custom Fields

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

Commitment Change Items (0) Custom Fields (0) **Notes (0)** **Documents (0)** Forms (0) Processes (0)

Attach Documents Remove

File Name	Attached By	Date Attached
There are no documents attached to this commitment change.		

Attach Documents Remove

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

Commitment Change Details

Mail Merge Make Pending Make Projected **Request Approval** **Approve** Edit Delete

Project:	Dan- e-Builder Test	Status:	Draft
Commitment:	001 - Test Description	Company:	Industrial Salvage
Change Number:	001		

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

- Go to the **Cost** tab.

Dashboard Projects Planning Forms Processes Documents Calendar Contacts Bidding **Cost** Schedule Reports Setup +

Cost Summary | Items Pending Approval | Unfinished Drafts | Data Entry

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

10.000	Site Selection	0.00	0.00	0.00	0.00	0.00
10.060	Survey and Geotechnical	0.00	0.00	0.00	0.00	0.00
20.010	Direct Charges	0.00	0.00	0.00	0.00	0.00
20.020	Indirect Charges	0.00	0.00	0.00	0.00	0.00
20.030	Design Professional	0.00	0.00	0.00	0.00	0.00
20.040	Environmental Services	0.00	0.00	0.00	0.00	0.00
20.050	Special Services	0.00	0.00	0.00	0.00	0.00
30.010	Direct Charges	0.00	0.00	0.00	0.00	0.00
30.020	Indirect Charges	0.00	0.00	0.00	0.00	0.00

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

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
0.00	0.00	0.00	0.00	0.00

Show: All Show Filter

Invoice #	Description	Commitment #	Commitment Description	Company	Date Received	Status	Invoice Amount
There are no invoices for the selection.							

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

Add Invoice

Do you want to apply this invoice towards a commitment?

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

Add Invoice

Invoice Overview Save and Add New **Save** Cancel

Project:	Dan- e-Builder Test	
* Commitment:	001 - Test Description	
* Invoice Number:	001	
* Date Received:	07.15.2013	
This is a retainage release:	<input type="checkbox"/>	
* Description:	Work Performed on East Wing	
* Status:	Draft (Request Approval)	
Company/Contact:	Industrial Salvage	
Date Due:		

Invoice Items

Commitment Item #	Description	Current Commitment	Invoiced To Date	Retained To Date	Remaining to be Invoiced	Invoice Amount	Retainage %	Retained This Invoice
001	Site Selection	0.00	0.00	0.00	0.00	2,000.00	0.00%	0.00
Total		0.00	0.00	0.00	0.00	2,000.00		0.00

[Cost Summary](#) | [Commitment Details](#) | [Invoices For This Company](#)

Invoice Custom Fields

Period Start:	<input type="text"/>
Period End:	<input type="text"/>
Vendor Invoice Number:	<input type="text"/>
PeopleSoft Voucher Number:	<input type="text"/>

Save and Add New Save Cancel

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

Invoice Items (0) Custom Fields (4) **Notes (0)** Documents (0) Forms (0) **Processes (0)**

Attach Processes Remove

Process	Subject	Current Step	Since	Attached By	Date Attached
There are no processes attached to this invoice					

Attach Processes Remove

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

Invoice Details

Invoice Overview
Other Details

Mail Merge
Approve
Reject
Mark Paid
Edit

Project:	Dan- e-Builder Test		Status:	Draft (Approval Requested)
Commitment:	001 - Test Description		Company:	Industrial Salvage
Current Commitment Amount:		0.00	Company Number:	IND001
Invoice Number:	001		Contact:	
Description:	Work Performed on East Wing		Date Received:	07.15.2013
Invoice Amount:		0.00	Approval Requested:	07.15.2013 (Dan Edge)
Retained This Invoice:		0.00		

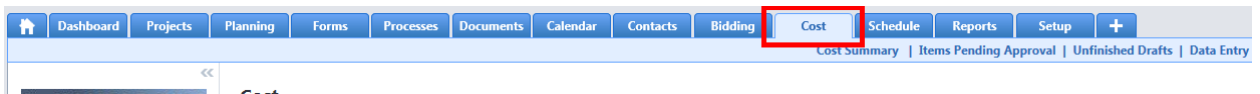
Invoice Items (0)
Custom Fields (4)
Notes (0)
Documents (0)
Forms (0)
Processes (0)

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.

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
003.080	Specialty Consulting	133,000.00	154,000.00	(16,000.00)	2,746.00	2,746.00

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

Forecasting for East Tower

Forecasts								Add Forecast
Forecast	Budget	Current Commitments	Projected Commitments	Actuals Approved	Forecasted Commitments	Unallocated Reserve	Estimate At Completion	Forecasted Over/ (Under)
There are no forecasts.								

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

Add Forecast

Forecast as of period ending: Live

Continue

Cancel

- A required name is auto-generated but can be changed if desired.
- 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.
- De-select the 'Calculate Unallocated Reserve' check-box when you are ready to begin forecasting commitments.
- 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.

Add Forecast

Forecast Details Save Draft Save Final Cancel

Project: East Tower

Project Number:

As Of Period Ending: Live

* Name: Forecast created on 07.15.2013 3:31 PM

Description:

Instructions: Complete forecast updates by the 20th of the month.

Forecast Documents (0) Forms (0) Processes (0)

Forecast Data Expand All | Collapse All Group By: Line Item

Account Code	Description	Calculate Unallocated Reserve	Budget	Current Commitments	Projected Commitments	Actuals Approved	Forecasted Commitments	Unallocated Reserve	Estimate at Completion	Forecasted Over/ (Under)
100.100.010	Professional Consulting Fees	<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Description	Assumption			Forecasted Commitment	Budgeted	Committed			
						<input checked="" type="checkbox"/>	<input type="checkbox"/>			
100.100.020	Legal Fees	<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Description	Assumption			Forecasted Commitment	Budgeted	Committed			
						<input checked="" type="checkbox"/>	<input type="checkbox"/>			

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

Add Forecast

Forecast Details Save Draft Save Final Cancel

Project: East Tower

Project Number:

As Of Period Ending: Live

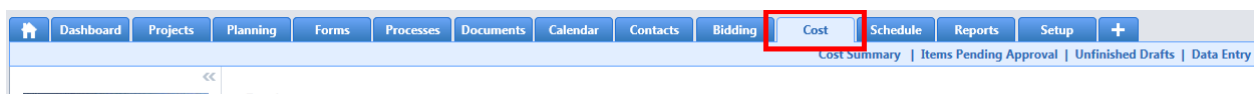
* Name: Forecast created on 07.15.2013 3:31 PM

Description:

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
003.030	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
003.050	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
003.080	Specialty Consulting	133,000.00	154,000.00	(16,000.00)	2,746.00	2,746.00

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

Forecasting for East Tower

Forecasts **Add Forecast**

Forecast	Budget	Current Commitments	Projected Commitments	Actuals Approved	Forecasted Commitments	Unallocated Reserve	Estimate At Completion	Forecasted Over/ (Under)
There are no forecasts.								

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

Add Forecast

Forecast as of period ending: Live

Continue
Cancel

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

Forecast Documents (0) Forms (0) Processes (0)

Forecast Data Expand All | Collapse All Group By: Line Item **Switch to Adjustment Mode**

Account Code	Description	Calculate Unallocated Reserve	Budget	Current Commitments	Projected Commitments	Actuals Approved	Forecasted Commitments	Unallocated Reserve
0000	Scripps Test #0511222002546646888777888	<input checked="" type="checkbox"/>	900.00	202.00	1,000,000,000,202.00	2.00	1.00	0.00

Description	Assumption	Forecasted Commitment	Budgeted	Committed
		1.00	<input checked="" type="checkbox"/>	<input type="checkbox"/> Delete

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.

Edit Forecast

Forecast Details Save Draft Save Final Cancel

Project: E-builder Fieldhouse
 Project Number: 88888888
 As Of Period Ending: Live
 * Name: Forecast saved on 03.01.2013
 Description:

Forecast Documents (0) Forms (0) Processes (0)

Forecast Data Expand All Collapse All Group By: Line Item Switch to Detail Mode

Account Code	Description	Calculate Unallocated Reserve	Budget	Current Commitments	Projected Commitments	Actuals Approved	Forecasted Commitments	Unallocated Reserve
0000	Scripps Test #05112220025466468888777888	<input checked="" type="checkbox"/>	900.00	202.00	1,000,000,000,202.00	2.00	1.00	0.00
	Description	Assumption	Adjustment Amount				Add	Net Adjust
	Test 3	Test 3	20.00				02.28.2013	2
	Test 2		Test 2			150.00		02.28.2013
	Test 1	Test 1	110.00				02.28.2013	

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

Edit Forecast

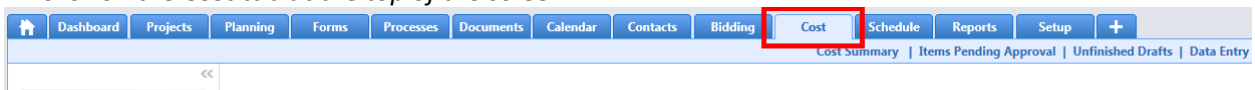
Forecast Details Save Draft Save Final Cancel

Project: E-builder Fieldhouse
 Project Number: 88888888
 As Of Period Ending: Live
 * Name: Forecast saved on 03.01.2013
 Description:

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.

▼ Cost	10.060	Survey and Geotechnical	0.00	0.00	0.00	0.00	0.00
Cost Summary	20.010	Direct Charges	0.00	0.00	0.00	0.00	0.00
Funding Sources	20.020	Indirect Charges	0.00	0.00	0.00	0.00	0.00
Budget Details	20.030	Design Professional	0.00	0.00	0.00	0.00	0.00
Commitments	20.040	Environmental Services	0.00	0.00	0.00	0.00	0.00
Actual Costs	20.050	Special Services	0.00	0.00	0.00	0.00	0.00
Cash Flow	30.010	Direct Charges	0.00	0.00	0.00	0.00	0.00
	30.020	Indirect Charges	0.00	0.00	0.00	0.00	0.00

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

Project Cash Flow For Dan- e-Builder Test - 1234

Cash Flow Summary Previous Cash Flows **Setup Cash Flow** Update Cash Flow

Project: Dan- e-Builder Test
 Current Cash Flow: No Cash Flow has been created.
 Description:

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)

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.)

Setup Cash Flow Select Template to Apply Save Cancel

Line Item	Description	Cash Flow Curve	Schedule Link Type	Payment Lag (In Days)
00.010	Direct Charges	Manual	Link To Project	0
00.020	Indirect Charges	Manual	Link To Project	0
10.010	Direct Charges	Manual	Link To Project	0
10.020	Indir	Manual	Link To Project	0
10.030	Prelim	Manual	Link To Project	0
10.040	Envi	Manual	Link To Project	0
10.050	Site Selection	Manual	Link To Project	0

Use this drop-down and Apply To All for quick entry

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

Project Cash Flow For Dan- e-Builder Test - 1234

Cash Flow Summary Previous Cash Flows Setup Cash Flow **Update Cash Flow**

Project: Dan- e-Builder Test
 Current Cash Flow: No Cash Flow has been created.
 Description:

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)

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.

Description:

Cash Flow Custom Fields (0)

Forecast cash flow using **Projected Budget** and **Actuals Approved** Must allocate all funds in projections

Show all previous months **Export** **Import** **Recalculate Selected** **Recalculate All**

<input type="checkbox"/>	Graph	Line Item	Description	Projected Budget	Actuals To Date	Remaining To Be Allocated	Jul 2013
<input type="checkbox"/>		100.100.010	Professional Consulting Fees	17,000.00	4,500.00	12,500.00	0.00
<input type="checkbox"/>		100.100.020	Legal Fees	15,000.00	500.00	14,500.00	0.00
<input type="checkbox"/>		100.100.030	Feasibility Reimbursables	21,000.00	0.00	21,000.00	0.00

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).

Cash Flow Custom Fields (0)

Forecast cash flow using **Projected Budget** and **Actuals Approved** Must allocate all funds in projections

Show all previous months **Export** **Import** **Recalculate Selected** **Recalculate All**

<input type="checkbox"/>	Graph	Line Item	Description	Projected Budget	Actuals To Date	Remaining To Be Allocated	Jul 2013
<input checked="" type="checkbox"/>		100.100.010	Professional Consulting Fees	17,000.00	4,500.00	12,500.00	0.00
<input checked="" type="checkbox"/>		100.100.020	Legal Fees	15,000.00	500.00	14,500.00	0.00
<input checked="" type="checkbox"/>		100.100.030	Feasibility Reimbursables	21,000.00	0.00	21,000.00	0.00
<input type="checkbox"/>		110.110.010	Professional Fees - Fixed	17,790.00	0.00	17,790.00	0.00
<input type="checkbox"/>		110.110.020	Professional Fees - Time & Material	12,800.00	0.00	12,800.00	0.00
<input type="checkbox"/>		110.110.030	Reimbursables	23,000.00	0.00	23,000.00	0.00

9. Click **Save**.

Update Cash Flow

Cash Flow Summary **Save** **Cancel**

Project: Norusis Psychiatric Center

Project Number:

Current Cash Flow: No Cash Flow has been created.

Description:

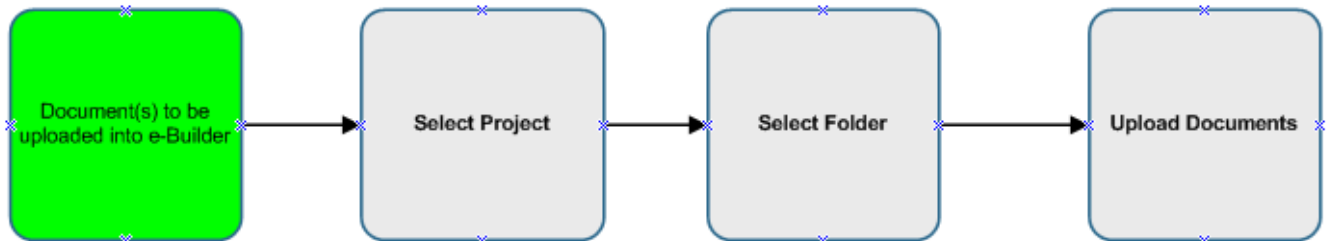
Documents Module

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



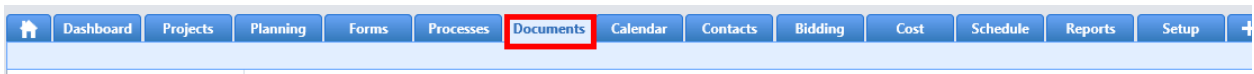
stored. The folder structure can be created any way the project team members need it to be. One of the key advantages of using the Documents module is that all members of a project can access the most up-to-date files from any location at any time.

Uploading Documents



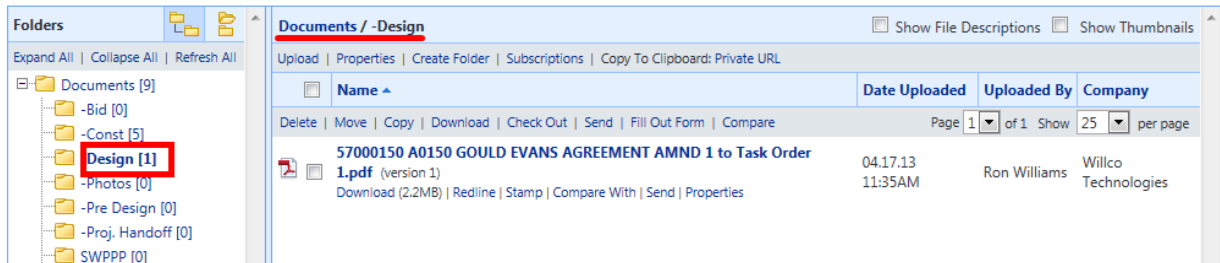
To upload files one at a time:

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.

Documents For



2. Click the **Upload** link.

Documents For



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

Upload Documents [?](#)

[Use Single File Upload Tool](#)

Project:	Criminal Justice Building Abatement - 1035 Locust
Folder:	-Design

- Xref Search Option
- Compress for Transfer

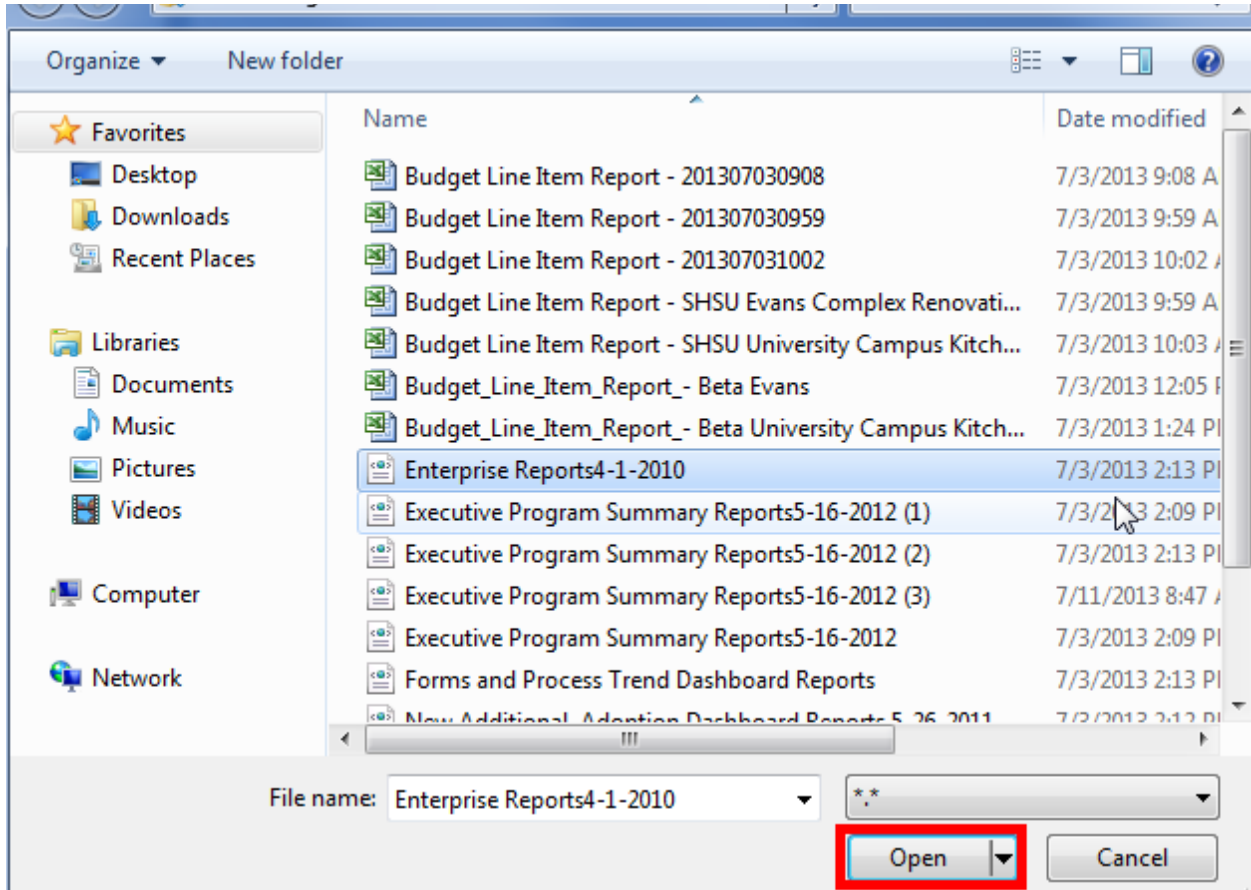
Number of Items : 0
Total Upload Size: 0B

Approx. Upload Time
T1 = 0 min 56K = 0 min

Description of Files:

Select Files Upload Now

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



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

Upload Documents ?

[Use Single File Upload Tool](#)

Project:	Criminal Justice Building Abatement - 1035 Locust
Folder:	-Design

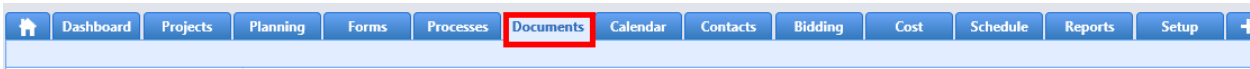
Xref Search Option
 Number of Items : 1
 Approx. Upload Time
 Compress for Transfer
 Total Upload Size: 0.5MB
 T1 = < 1 min 56K = 2 min

..... Enterprise Reports4-1-2010.xml

Description of Files:

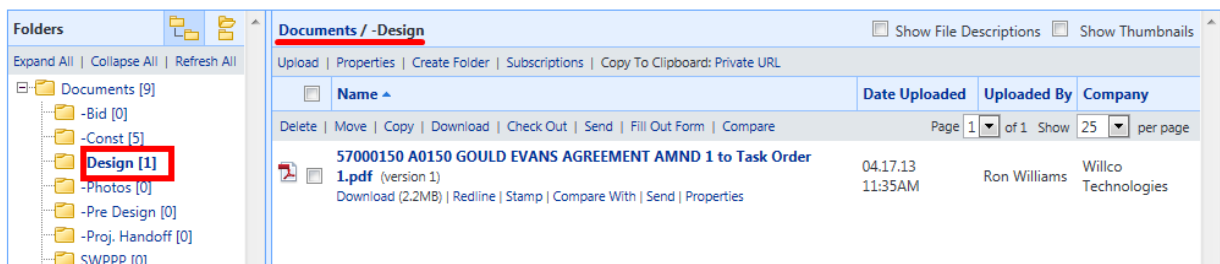
To upload multiple files:

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

Documents For



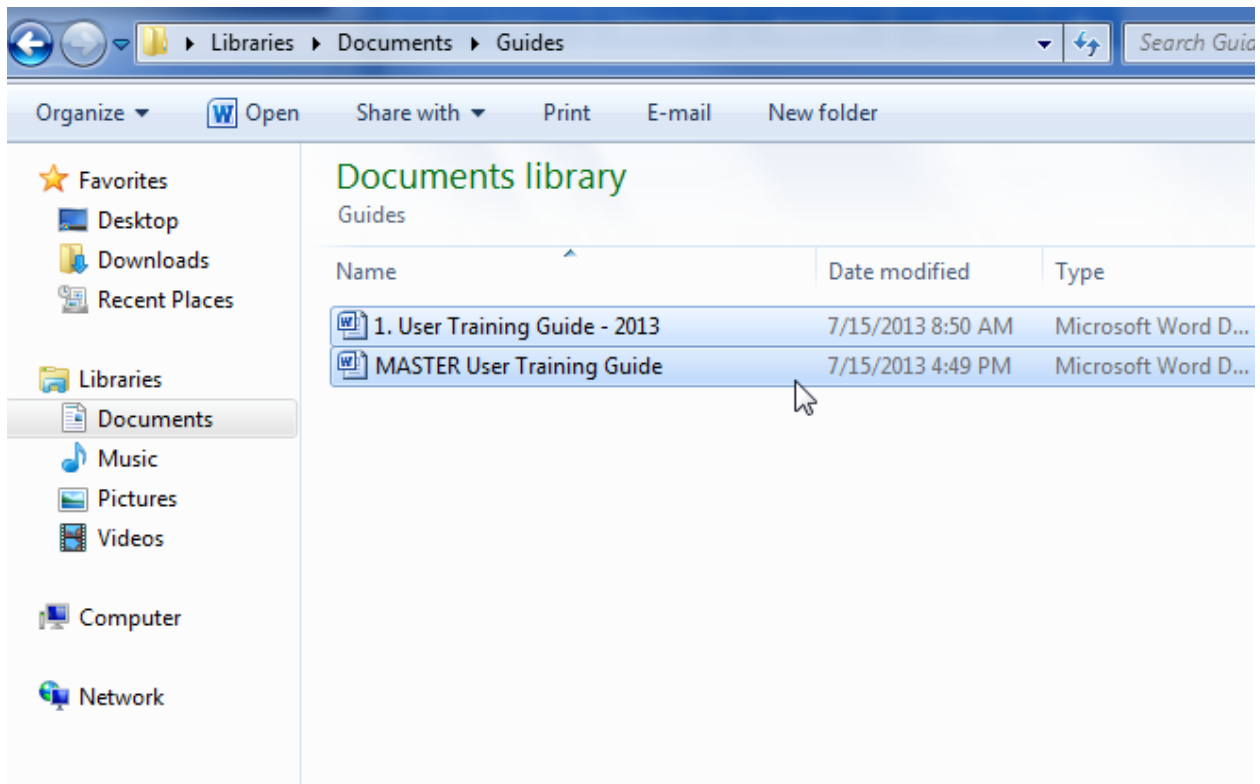
4. Click the **Upload** link.



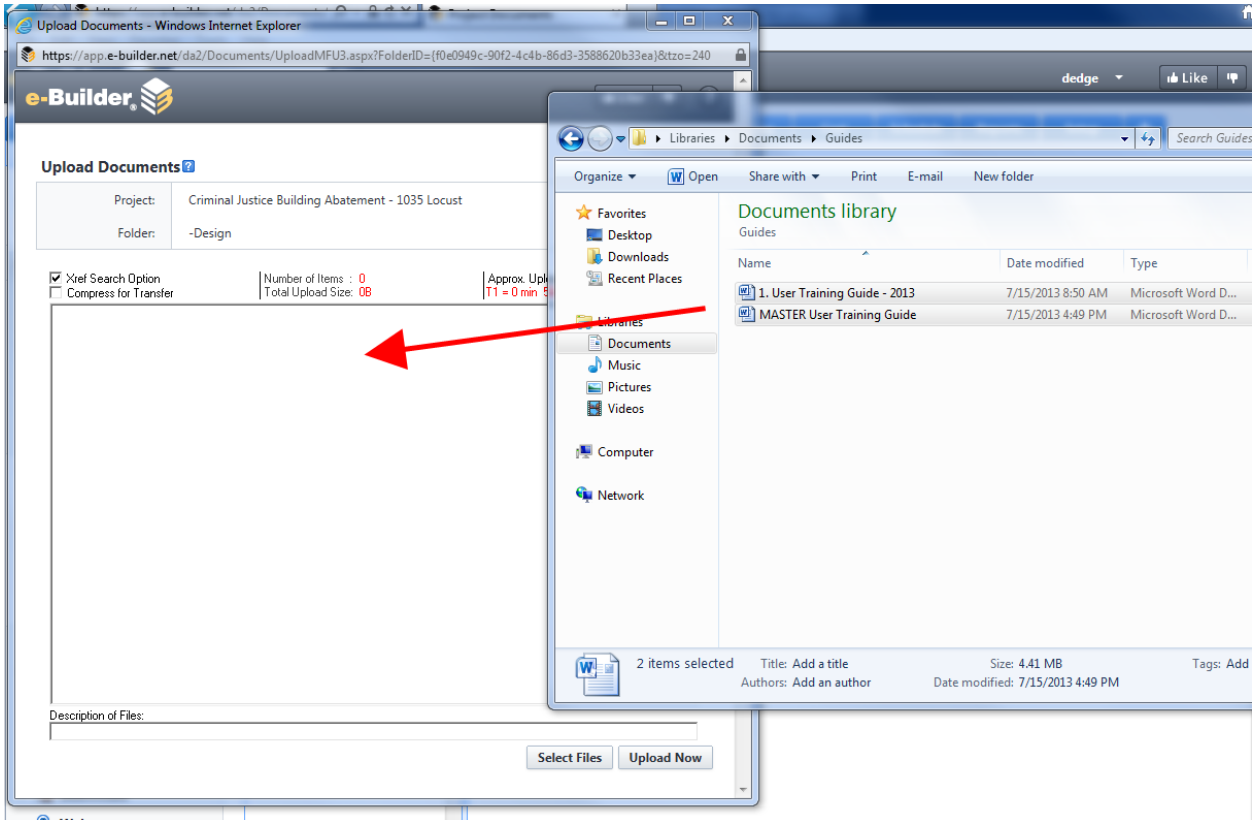
5. Open Window Explorer on computer.



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**.

Upload Documents ?

[Use Single File Upload Tool](#)

Project:	Criminal Justice Building Abatement - 1035 Locust
Folder:	-Design

- Xref Search Option
- Compress for Transfer

Number of Items : 2
Total Upload Size: 4.6MB

Approx. Upload Time
T1 = < 1 min 56K = 18 min

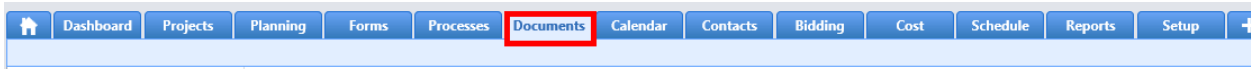
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1. User Training Guide - 2013.docx
<input checked="" type="checkbox"/>	<input type="checkbox"/>	MASTER User Training Guide.docx

Description of Files:

Select Files **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.

Documents For Criminal Justice Building Abatement - 1035 Locust - 570A0150

Documents / -Design

Name	Date Uploaded	Uploaded By	Company
57000150 A0150 GOULD EVANS AGREEMENT AMND 1 to Task Order 1.pdf (version 1)	04.17.13 11:35AM	Ron Williams	Willco Technologies

4. View document by clicking bold text of document.

Documents For Criminal Justice Building Abatement - 1035 Locust - 570A0150

Documents / -Design

Name	Date Uploaded	Uploaded By	Company
57000150 A0150 GOULD EVANS AGREEMENT AMND 1 to Task Order 1.pdf (version 1)	04.17.13 11:35AM	Ron Williams	Willco Technologies

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.

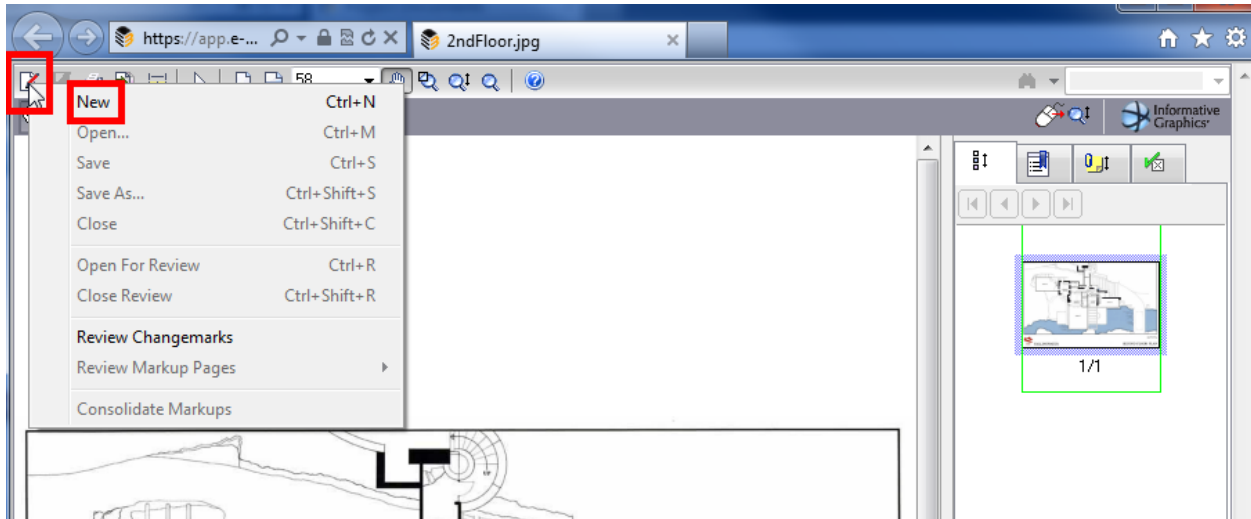
1. Click on the name of the folder where the document is stored. (See Viewing Documents above if needed)
2. Click on the **Redline** link below the file name. A new window opens.

Documents For Kai Training Center - ABC Construction

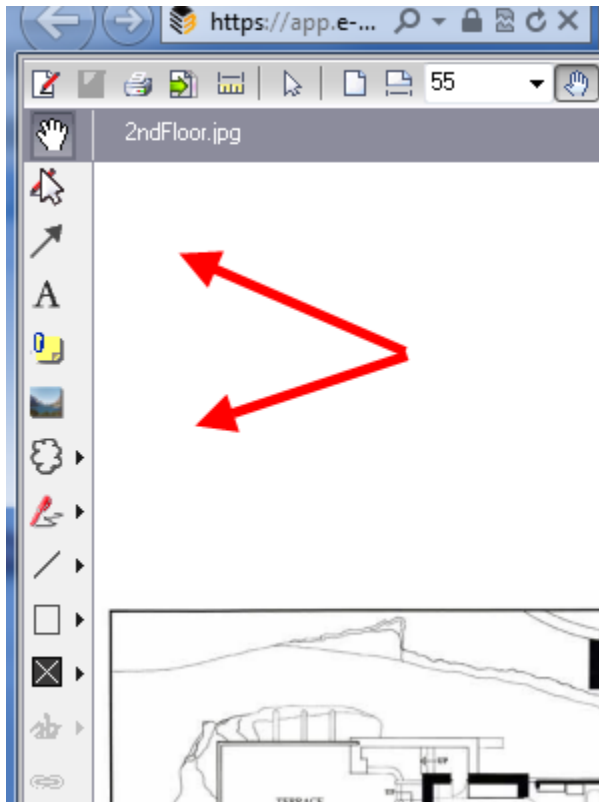
Documents / 08 Invoices / 03 Contractor

Name	Date Uploaded	Uploaded By	Company
2ndFloor.jpg (version 1)	06.27.13 09:00AM	Russel Hercules	e-Builder Inc.
CATS Project Custom Fields.xlsx (version 1)	10.15.12 05:11PM	Charlie Owen	e-Builder, Inc.
under-construction.gif (version 1)	04.08.09 10:55AM	Richard Craemer	e-Builder, Inc.

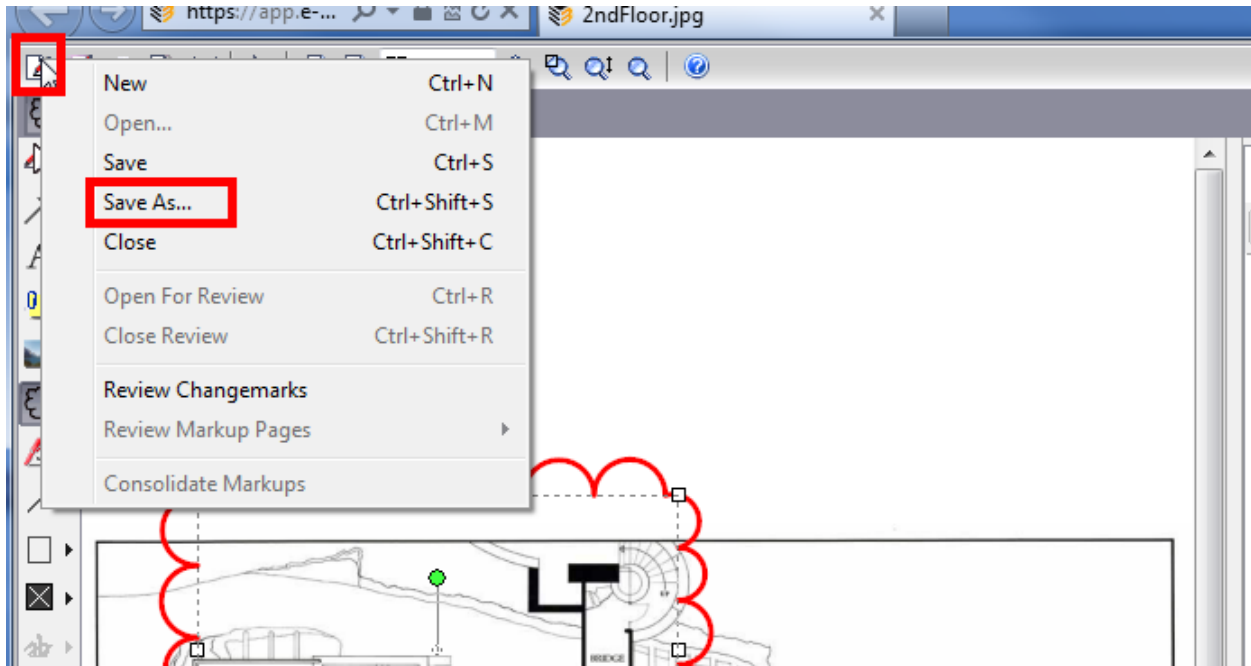
3. Click the **Markup Icon** and select **New**.



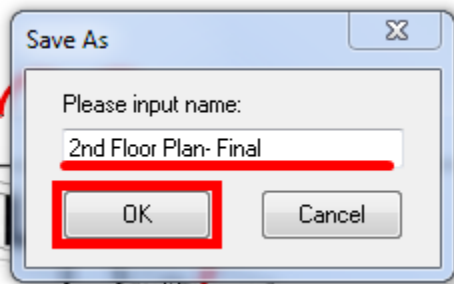
4. Use the tools on the left-hand side of screen to mark up the file.



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

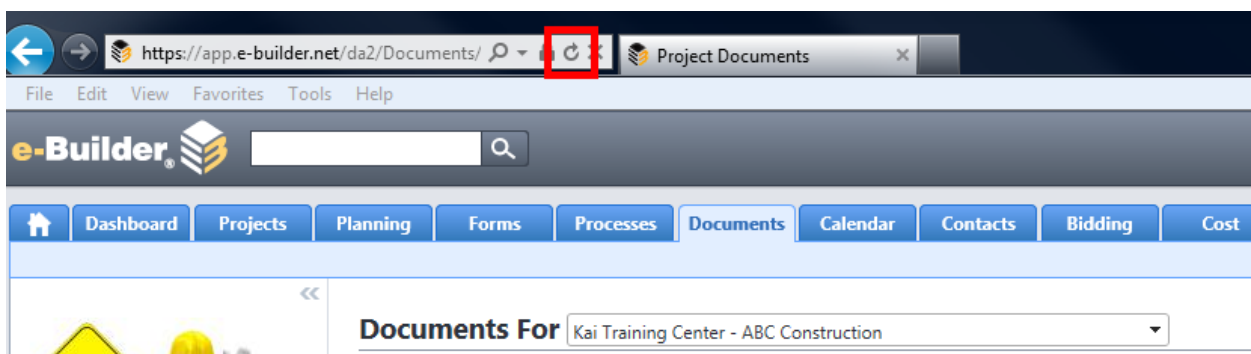


6. Enter the name of your markup and click **OK**.



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.

Name	Date Uploaded	Uploaded By	Company
<input type="checkbox"/> 2ndFloor.jpg (version 1) Download (79.4KB) Redline (1) Compare With Send Properties	06.27.13 09:00AM	Russel Hercules	e-Builder Inc.
<input checked="" type="checkbox"/> CATS Project Custom Fields.xlsx (version 1) Download (64.9KB) Redline Compare With Send Properties	10.15.12 05:11PM	Charlie Owen	e-Builder, Inc.
<input type="checkbox"/> under-construction.gif (version 1) Download (27.0KB) Redline (1) Compare With Send Properties	04.08.09 10:55AM	Richard Craemer	e-Builder, Inc.

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.

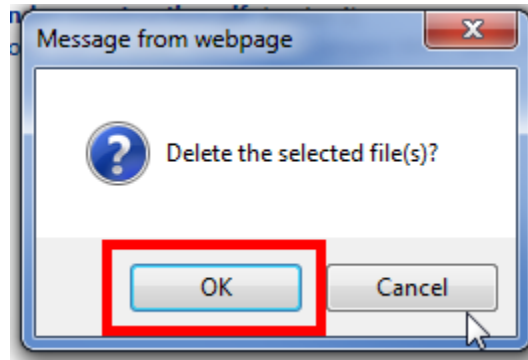
1. Click on the name of the folder where the document is stored. (See Viewing Documents above if needed)
2. Check the check boxes next to the files to be deleted.

Name	Date Uploaded	Uploaded By	Company
<input checked="" type="checkbox"/> 2ndFloor.jpg (version 1) Download (79.4KB) Redline (1) Compare With Send Properties	06.27.13 09:00AM	Russel Hercules	e-Builder Inc.
<input checked="" type="checkbox"/> CATS Project Custom Fields.xlsx (version 1) Download (64.9KB) Redline Compare With Send Properties	10.15.12 05:11PM	Charlie Owen	e-Builder, Inc.
<input checked="" type="checkbox"/> under-construction.gif (version 1) Download (27.0KB) Redline (1) Compare With Send Properties	04.08.09 10:55AM	Richard Craemer	e-Builder, Inc.

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

Name	Date Uploaded	Uploaded By	Company
<input checked="" type="checkbox"/> 2ndFloor.jpg (version 1) Download (79.4KB) Redline (1) Compare With Send Properties	06.27.13 09:00AM	Russel Hercules	e-Builder Inc.
<input checked="" type="checkbox"/> CATS Project Custom Fields.xlsx (version 1) Download (64.9KB) Redline Compare With Send Properties	10.15.12 05:11PM	Charlie Owen	e-Builder, Inc.
<input checked="" type="checkbox"/> under-construction.gif (version 1) Download (27.0KB) Redline (1) Compare With Send Properties	04.08.09 10:55AM	Richard Craemer	e-Builder, Inc.

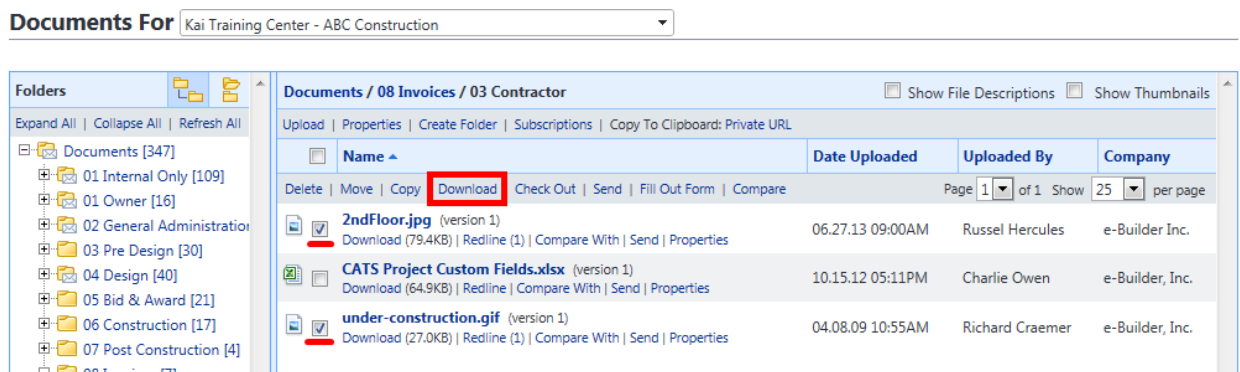
4. Click the **OK** button. The selection will be deleted.



* 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.

Documents For Kai Training Center - ABC Construction

Folders

Expand All | Collapse All | Refresh All

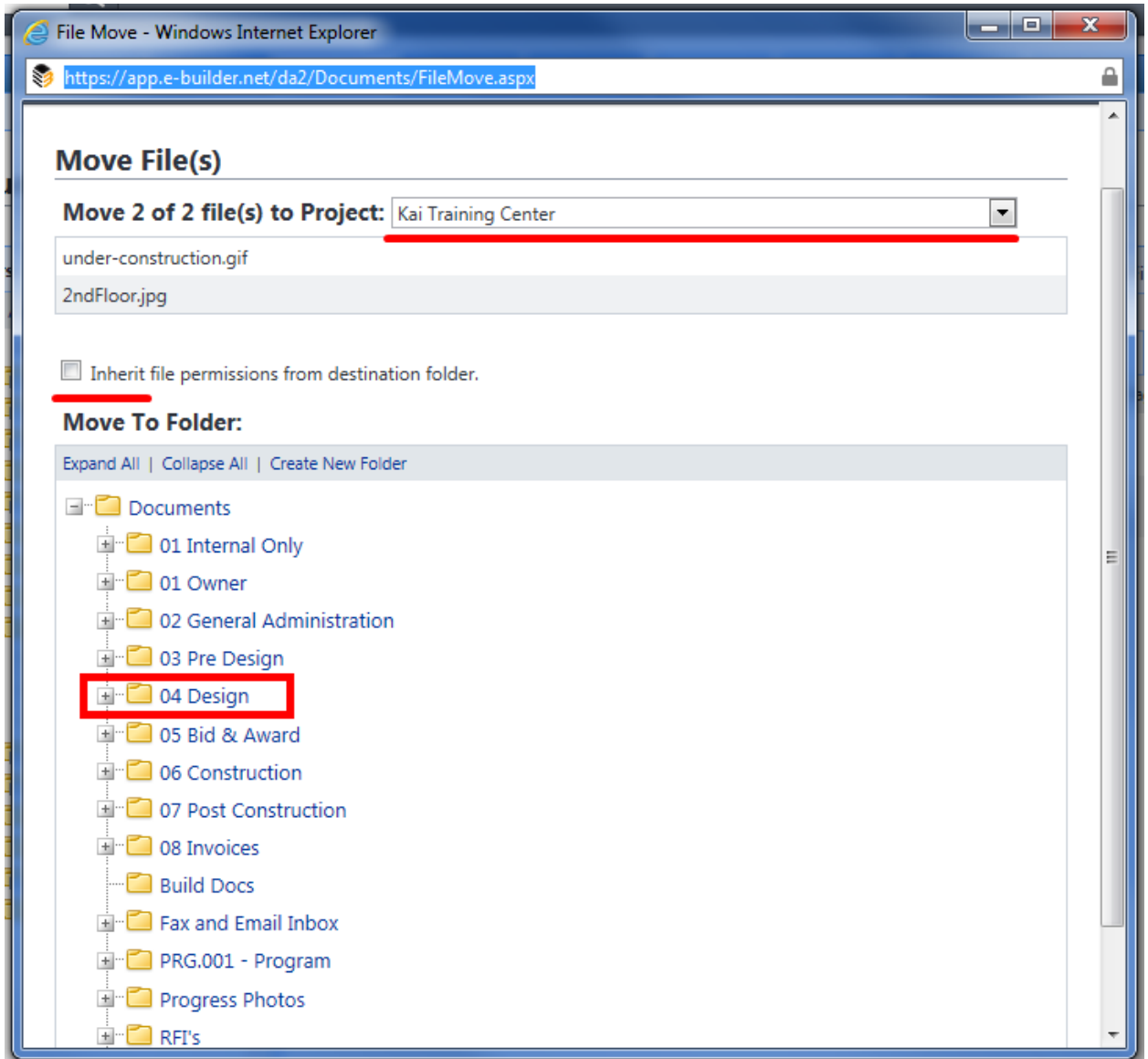
- Documents [347]
- 01 Internal Only [109]
- 01 Owner [16]
- 02 General Administration
- 03 Pre Design [30]
- 04 Design [40]
- 05 Bid & Award [21]
- 06 Construction [17]
- 07 Post Construction [4]
- 08 Invoices [7]
- 01 Owner [0]

Documents / 08 Invoices / 03 Contractor Show File Descriptions Show Thumbnails

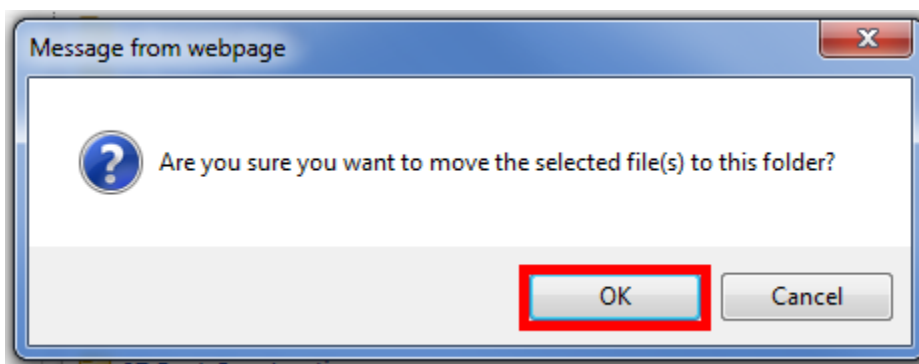
Upload | Properties | Create Folder | Subscriptions | Copy To Clipboard: Private URL

	Name	Date Uploaded	Uploaded By	Company
Delete	Move	Page 1 of 1 Show 25 per page		
<input checked="" type="checkbox"/>	2ndFloor.jpg (version 1) <small>Download (79.4KB) Redline (1) Compare With Send Properties</small>	06.27.13 09:00AM	Russel Hercules	e-Builder Inc.
<input checked="" type="checkbox"/>	CATS Project Custom Fields.xlsx (version 1) <small>Download (64.9KB) Redline Compare With Send Properties</small>	10.15.12 05:11PM	Charlie Owen	e-Builder, Inc.
<input checked="" type="checkbox"/>	under-construction.gif (version 1) <small>Download (27.0KB) Redline (1) Compare With Send Properties</small>	04.08.09 10:55AM	Richard Craemer	e-Builder, Inc.

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.

Documents For

Folders

Expand All | Collapse All | Refresh All

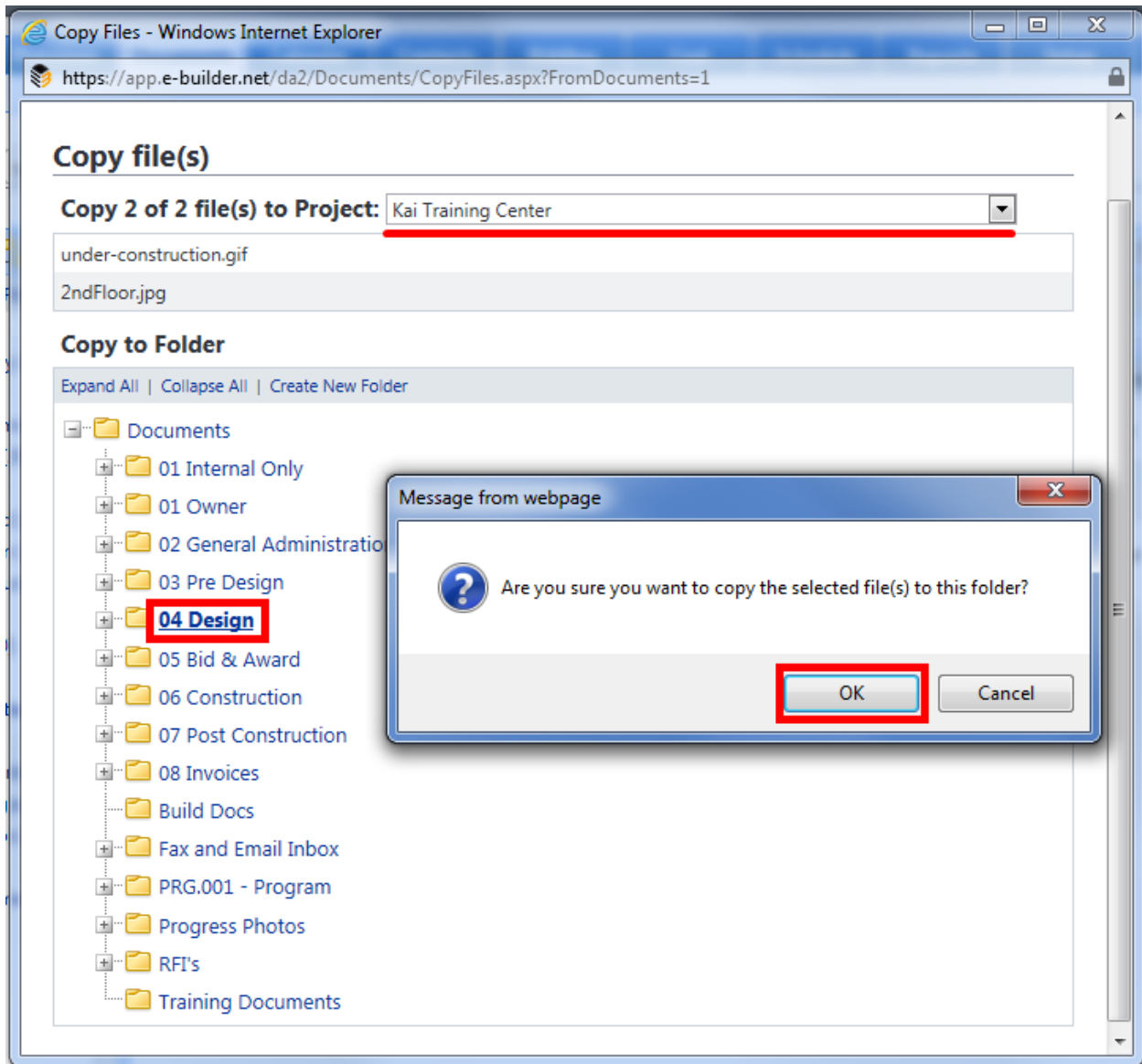
- Documents [347]
 - 01 Internal Only [109]
 - 01 Owner [16]
 - 02 General Administration
 - 03 Pre Design [30]
 - 04 Design [40]
 - 05 Bid & Award [21]
 - 06 Construction [17]
 - 07 Post Construction [4]
 - 08 Invoices [7]

Documents / 08 Invoices / 03 Contractor Show File Descriptions Show Thumbnails

Upload | Properties | Create Folder | Subscriptions | Copy To Clipboard: Private URL

Name	Date Uploaded	Uploaded By	Company
<div style="display: flex; justify-content: space-between; align-items: center; font-size: small;"> Delete Move Copy Download Check Out Send Fill Out Form Compare Page 1 of 1 Show 25 per page </div>			
<input checked="" type="checkbox"/> 2ndFloor.jpg (version 1) <small>Download (79.4KB) Redline (1) Compare With Send Properties</small>	06.27.13 09:00AM	Russel Hercules	e-Builder Inc.
<input checked="" type="checkbox"/> CATS Project Custom Fields.xlsx (version 1) <small>Download (64.9KB) Redline Compare With Send Properties</small>	10.15.12 05:11PM	Charlie Owen	e-Builder, Inc.
<input checked="" type="checkbox"/> under-construction.gif (version 1) <small>Download (27.0KB) Redline (1) Compare With Send Properties</small>	04.08.09 10:55AM	Richard Craemer	e-Builder, Inc.

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.

Documents For Kai Training Center - ABC Construction

The screenshot shows the 'Documents / 08 Invoices / 03 Contractor' folder. The file '2ndFloor.jpg' is selected, and the 'Check Out' button in the context menu is highlighted with a red box. The table below shows the details of the files in the folder.

Name	Date Uploaded	Uploaded By	Company
2ndFloor.jpg (version 1) Download (79.4KB) Redline (1) Compare With Send Properties	06.27.13 09:00AM	Russel Hercules	e-Builder Inc.
CATS Project Custom Fields.xlsx (version 1) Download (64.9KB) Redline Compare With Send Properties	10.15.12 05:11PM	Charlie Owen	e-Builder, Inc.
under-construction.gif (version 1) Download (27.0KB) Redline (1) Compare With Send Properties	04.08.09 10:55AM	Richard Craemer	e-Builder, Inc.

Documents For Kai Training Center - ABC Construction

The screenshot shows the same folder as above. The file '2ndFloor.jpg' is now checked out, indicated by a green checkmark icon. The 'Properties' link in the context menu is highlighted with a red box. The table below shows the details of the files in the folder.

Name	Date Uploaded	Uploaded By	Company
2ndFloor.jpg (version 1) Download (79.4KB) Redline (1) Compare With Send Properties	06.27.13 09:00AM	Russel Hercules	e-Builder Inc.
CATS Project Custom Fields.xlsx (version 1) Download (64.9KB) Redline Compare With Send Properties	10.15.12 05:11PM	Charlie Owen	e-Builder, Inc.
under-construction.gif (version 1) Download (27.0KB) Redline (1) Compare With Send Properties	04.08.09 10:55AM	Richard Craemer	e-Builder, Inc.

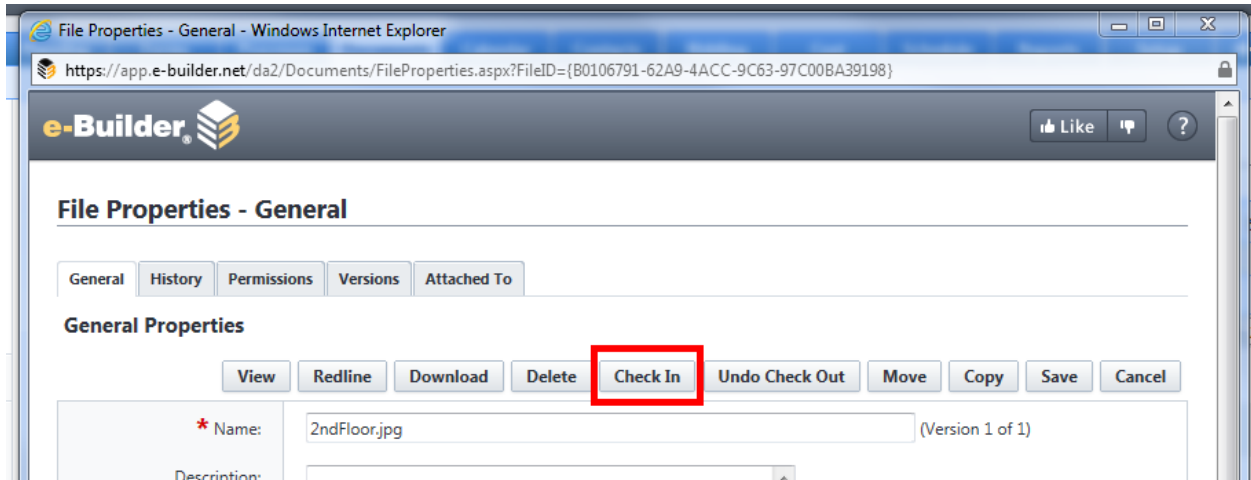
- Any changes can be made to the document and the document can be renamed if desired. Save document to computer.
- To undo Check Out, click the **Properties** link beneath the checked out document.

Documents For Kai Training Center - ABC Construction

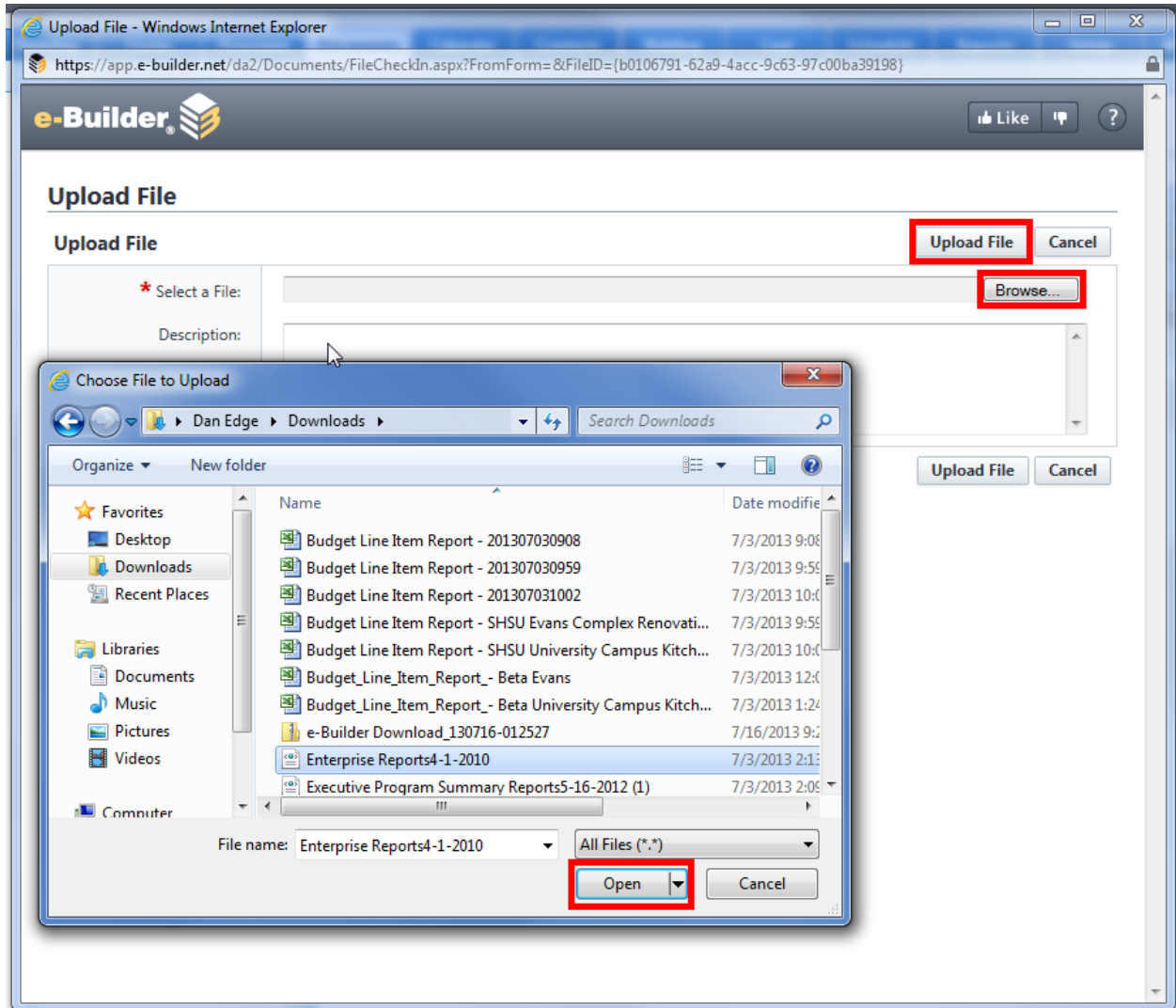
The screenshot shows the same folder as above. The file '2ndFloor.jpg' is still checked out. The 'Check In' button in the context menu is highlighted with a red box. The table below shows the details of the files in the folder.

Name	Date Uploaded	Uploaded By	Company
2ndFloor.jpg (version 1) Download (79.4KB) Redline (1) Compare With Send Properties	06.27.13 09:00AM	Russel Hercules	e-Builder Inc.
CATS Project Custom Fields.xlsx (version 1) Download (64.9KB) Redline Compare With Send Properties	10.15.12 05:11PM	Charlie Owen	e-Builder, Inc.
under-construction.gif (version 1) Download (27.0KB) Redline (1) Compare With Send Properties	04.08.09 10:55AM	Richard Craemer	e-Builder, Inc.

- 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.

Documents For

Folders | Expand All | Collapse All | Refresh All

- Documents [347]
 - 01 Internal Only [109]
 - 01 Owner [16]
 - 02 General Administration
 - 03 Pre Design [30]
 - 04 Design [40]
 - 05 Bid & Award [21]
 - 06 Construction [17]
 - 07 Post Construction [4]

Documents / 08 Invoices / 03 Contractor | Show File Descriptions | Show Thumbnails

Upload | Properties | Create Folder | Subscriptions | Copy To Clipboard: Private URL

Name	Date Uploaded	Uploaded By	Company
<input checked="" type="checkbox"/> 2ndFloor.jpg (version 1) <small>Download (79.4KB) Redline (1) Compare With Send Properties</small>	06.27.13 09:00AM	Russel Hercules	e-Builder Inc.
<input checked="" type="checkbox"/> CATS Project Custom Fields.xlsx (version 1) <small>Download (64.9KB) Redline Compare With Send Properties</small>	10.15.12 05:11PM	Charlie Owen	e-Builder, Inc.
<input checked="" type="checkbox"/> under-construction.gif (version 1) <small>Download (27.0KB) Redline (1) Compare With Send Properties</small>	04.08.09 10:55AM	Richard Craemer	e-Builder, Inc.

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

Send File(s)

Send Method

* How would you like to send the files?

Email
 Fax
 Notify

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**

Send File(s) - Windows Internet Explorer
https://app.e-builder.net/da2/Documents/SendFiles.aspx

Email Information Previous Check Spelling **Send** Cancel

* Send Files As: Attachments

* To:

You can add additional email addresses one per line or separate them with a semicolon ";".

Lookup Show List of Intended Recipients in Email

* Subject:

Message:

Attached File(s) - (0.11 MB)

File Name	PDF	Native File
under-construction.gif	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2ndFloor.jpg	<input type="checkbox"/>	<input checked="" type="checkbox"/>

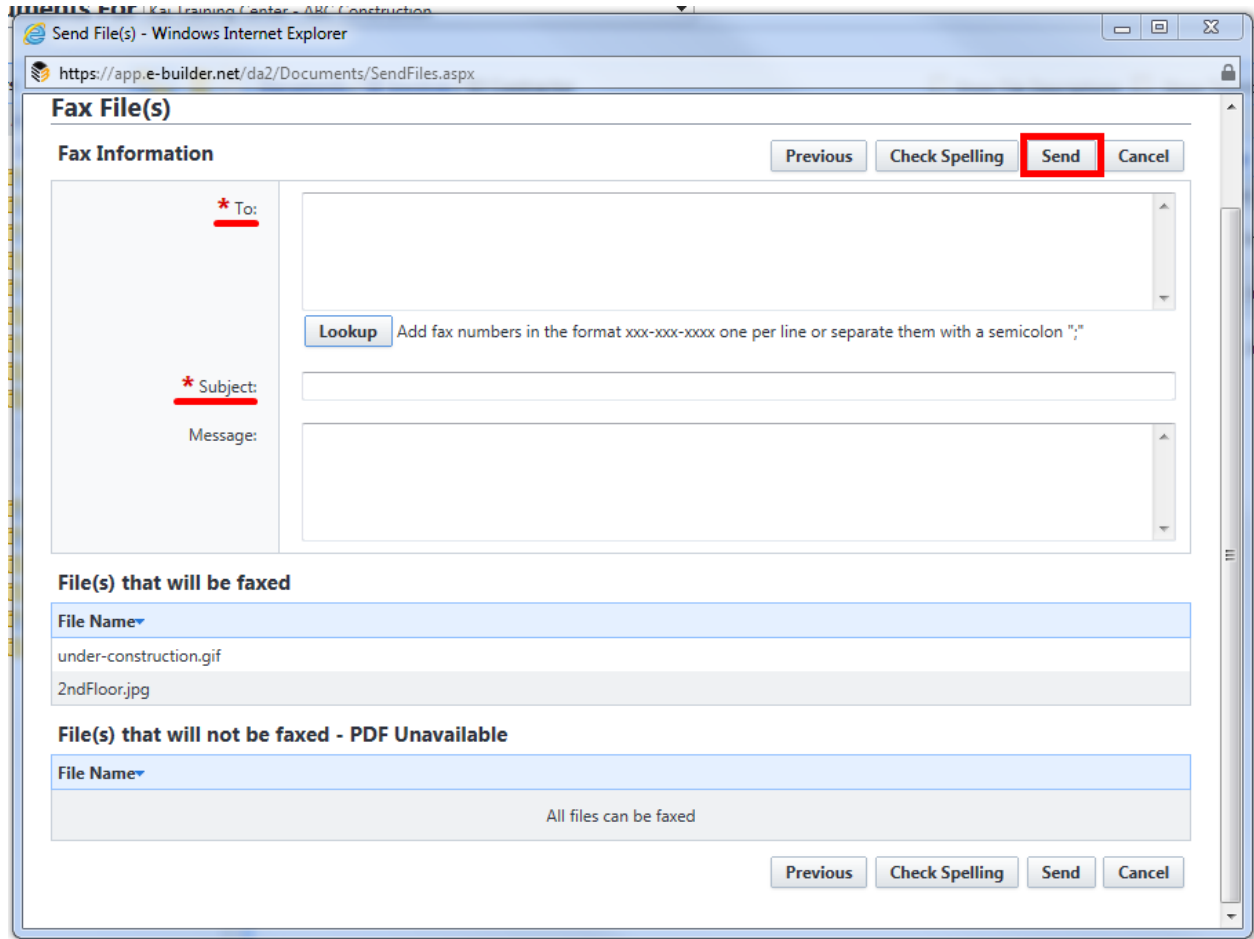
Exception File(s) - PDF Unavailable, No Download Permission

All files can be emailed

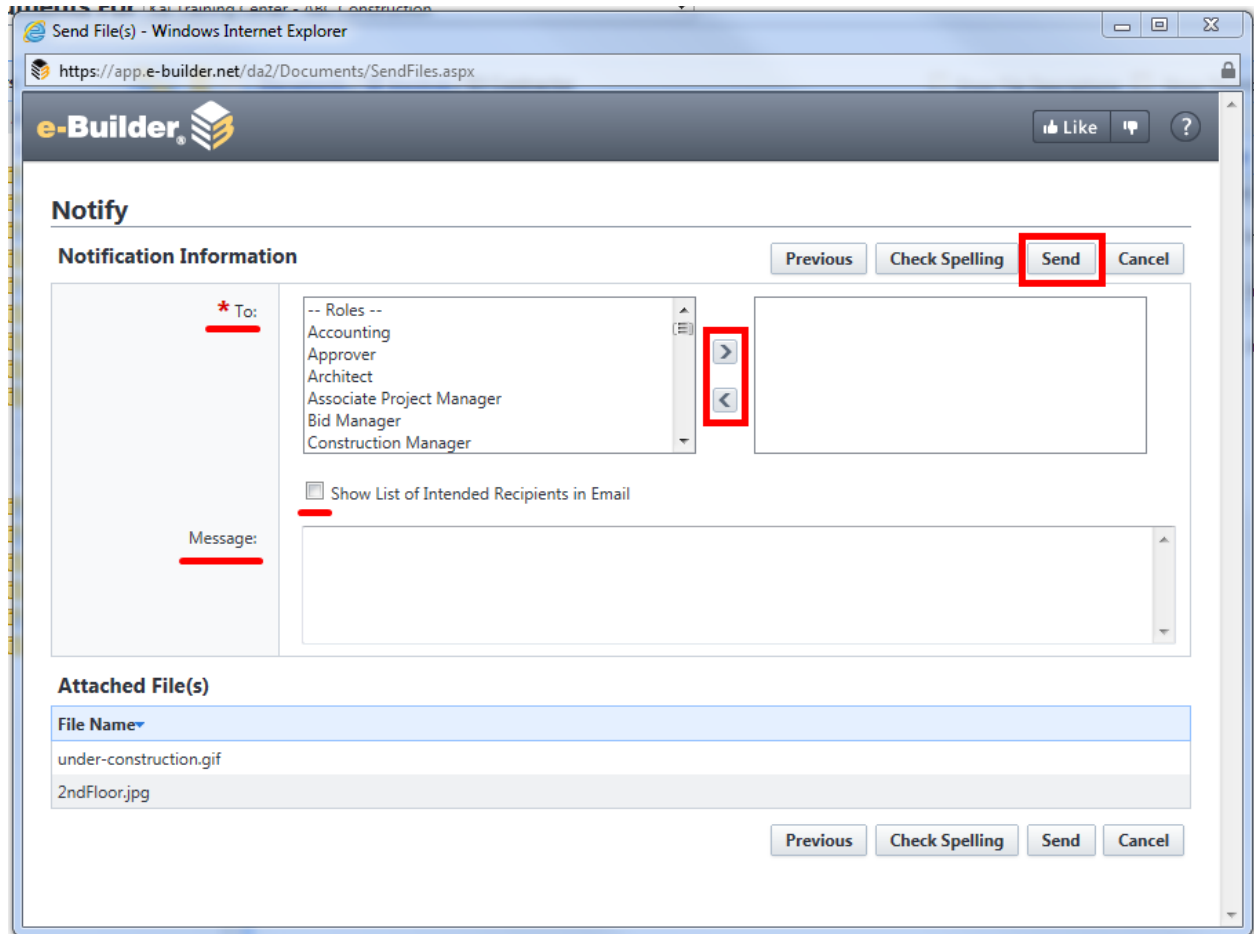
Previous Check Spelling Send Cancel

5. For Fax:

- Insert fax numbers manually or use "lookup" function
- Add a subject and optional message
- Click **Send**



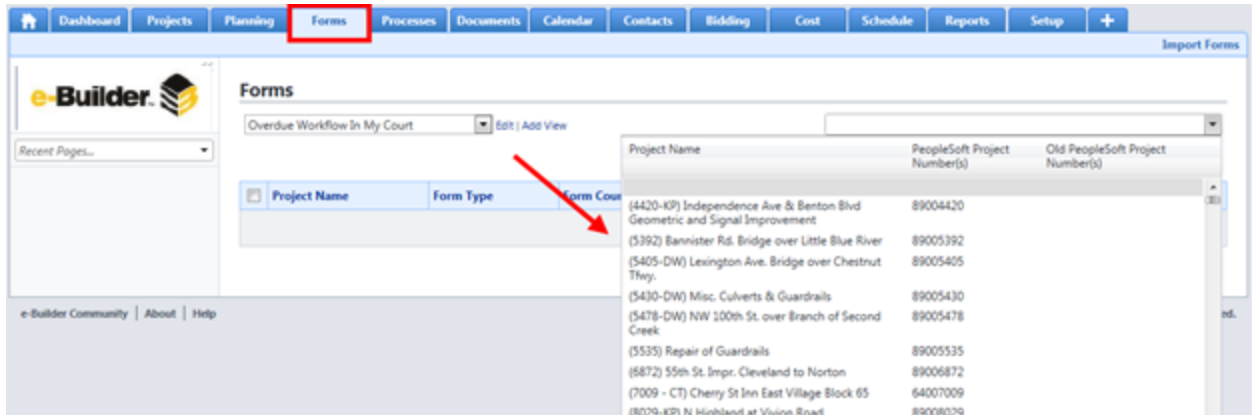
6. For Notify: (Used to send documents to users within e-Builder)
- Select users from list box on left and use arrows to move between boxes. (Right box represents users that will receive files)
 - Choose to "Show List of Intended Recipients in Email" or add message if desired.
 - Click **Send**



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.

Forms for

Filter Forms **Fill Out Form**

Project Name:	Dan- e-Builder Test	
Type of Form:	<input type="text" value="Workflow in Your Court"/>	<input checked="" type="checkbox"/> Open <input type="checkbox"/> Closed
Containing Text:	<input type="text"/>	<input type="text" value="anywhere in the form"/>

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

e-Builder Like ?

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

Fill Out Form - Windows Internet Explorer
 https://app.e-builder.net/da2/Forms/CreateForm.aspx?FormTypeID=%7b808D58F5-56B8-42E3-A31B-B4D3E4AB5D92%7d&PortalID=11e4328b-d1db-4941-97...

e-Builder Like ?

Fill Out Form

Draft Saved Successfully... Print Check Spelling Post Form Save Draft Delete Draft Cancel

Project: Dan- e-Builder Test

Form Type: Action Item

Author: Dan Edge

Counter Prefix:

Priority: Normal ▾

* Subject:

* Send To: Select From: All Roles ▾
 --Select Recipient-- ▾

* Date Due:

CC: -- Roles --
 Acquisition Lead
 Acquisition Reviewer
 Acquisition Specialist
 Administrative Support
 Appraisal Consultant
 Assistant City Manager

Request external comment after posting?

Action Item | Attached Files | Attached Forms

* Action Requested:

Action Response:

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**

comment after posting:

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=eOTMpZShsy2jPnwUU3+bm1dHbAo/hIooKocbTgfPsWmgWrfiw+fcf

e-Builder 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...

<input checked="" type="checkbox"/> Xref Search Option	Number of Items : 0	Approx. Upload Time
<input type="checkbox"/> Compress for Transfer	Total Upload Size: 0B	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)

comment after posting?

Action Item Attached Files **Attached Forms**

Attach Forms

Attach Forms - Windows Internet Explorer
https://app.e-builder.net/da2/Forms/AttachForms.aspx?QS=hCtY2QEy2QIWq8jwBuYHV/ps2zBCfBY/M7eYV6mx2sGLWF201I

e-Builder Like ?

Attach Forms from Dan- e-Builder Test

Filter Forms

Type of Form : Workflow in Your Court Open Closed

Containing Text: anywhere in the form

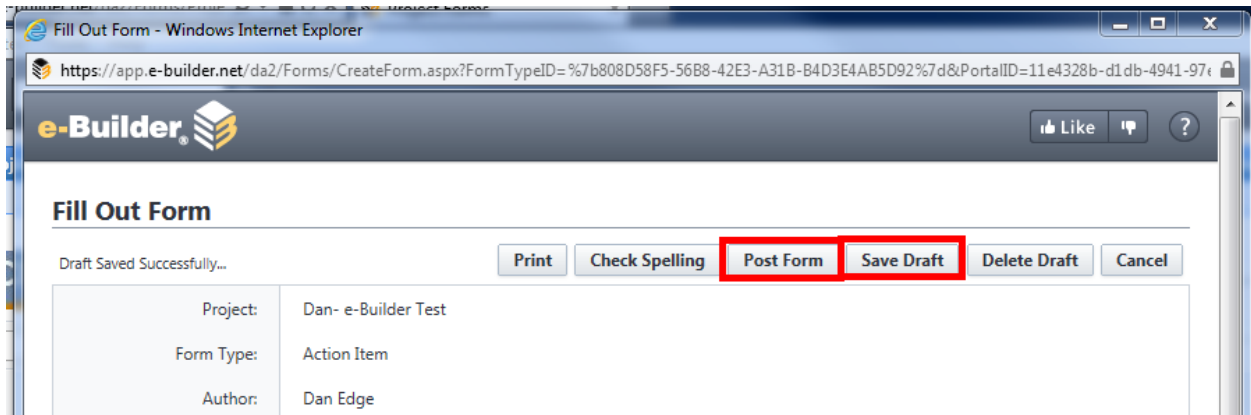
Filter

Workflow Forms In Your Court **Attach** Cancel

<input type="checkbox"/>	Form ▲	Subject	Author	Held By	Due Date
← There are no forms that meet your filter criteria.					

Attach Cancel

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*

Fill Out Form - Windows Internet Explorer

https://app.e-builder.net/da2/Forms/CreateForm.aspx?FormTypeID={9160C029-3AE0-4ED7-9436-9B5520BC57AC}&PortalID=11e4328b-d1db-49

e-Builder Like ?

Fill Out Form

Print Check Spelling Post Form Save Draft Cancel

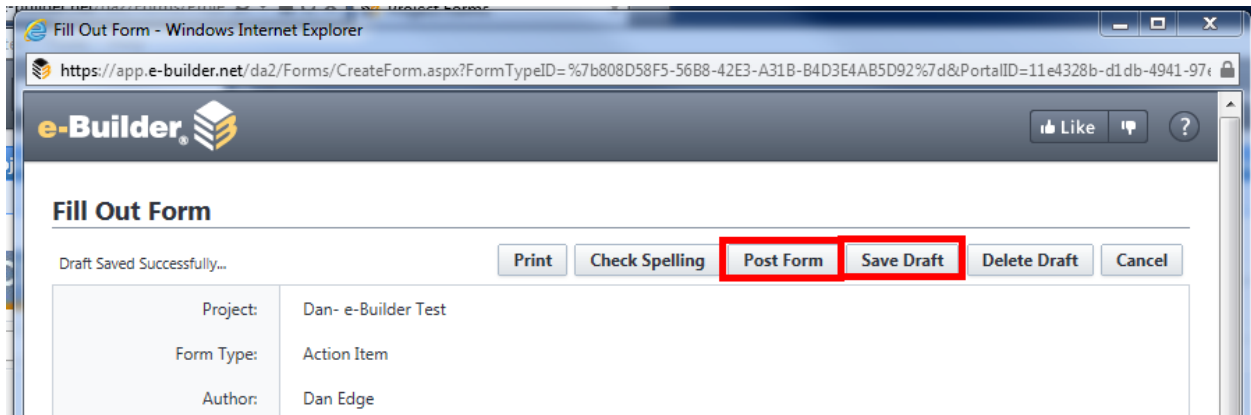
Project:	Dan- e-Builder Test	
Form Type:	Accident Report	
Author:	Dan Edge	
Counter Prefix:	<input type="text"/>	
Priority:	Normal ▾	
* Subject:	<input type="text"/>	
CC:	<ul style="list-style-type: none"> Board Member Board Representative Central Finance City Manager Communication Specialist Construction Contractor Construction Manager 	<input type="text"/>
Request external comment after posting?	<input type="checkbox"/>	

Custom Fields Attached Files Attached Forms

Incident Information

* Incident Classification:	<input type="checkbox"/> Near Miss <input type="checkbox"/> Dangerous Occurrence <input type="checkbox"/> Property Damage <input type="checkbox"/> Injured Personnel
----------------------------	---

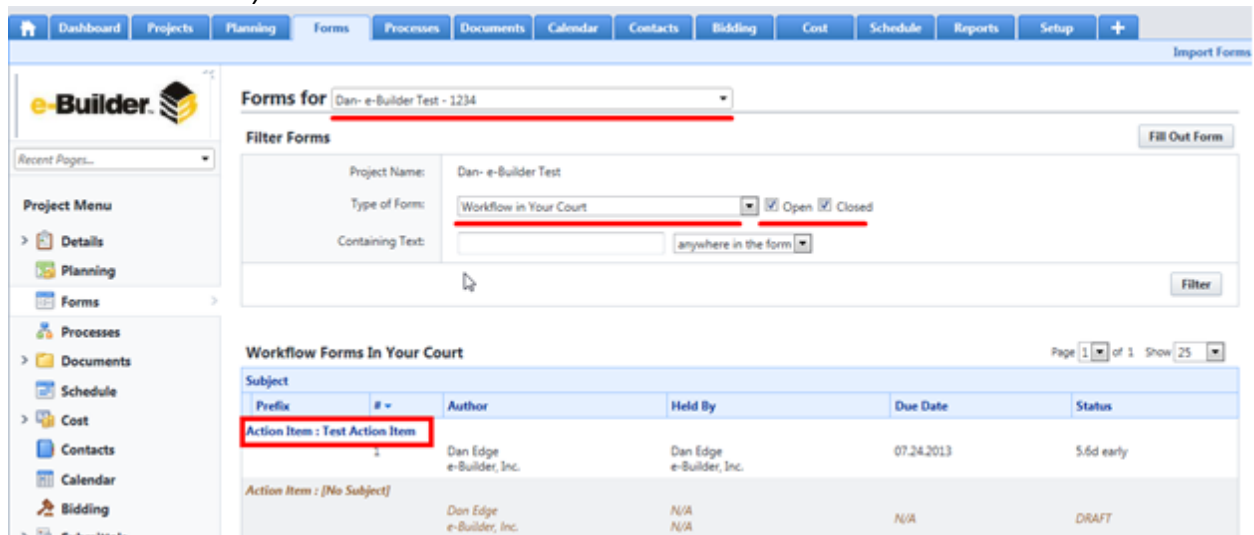
11. Attach back up documentation if needed. (Process is identical to attaching files to Workflow form above)
12. Attach Forms if needed. (Process is identical to attaching forms to Workflow form above)
13. Once complete, click **Post Form**. If you are not ready to post the form, click **Save**.



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.

Action Item #1

[Edit Form](#) [History](#) [Form Field History](#) [Permissions](#)

Tip: Go to comments tab to add or request a comment.

Form Details [Save](#) [Forward](#) [Close](#) [Print](#) [Copy](#) [Fill Out Form](#) [Check Spelling](#) [Cancel](#)

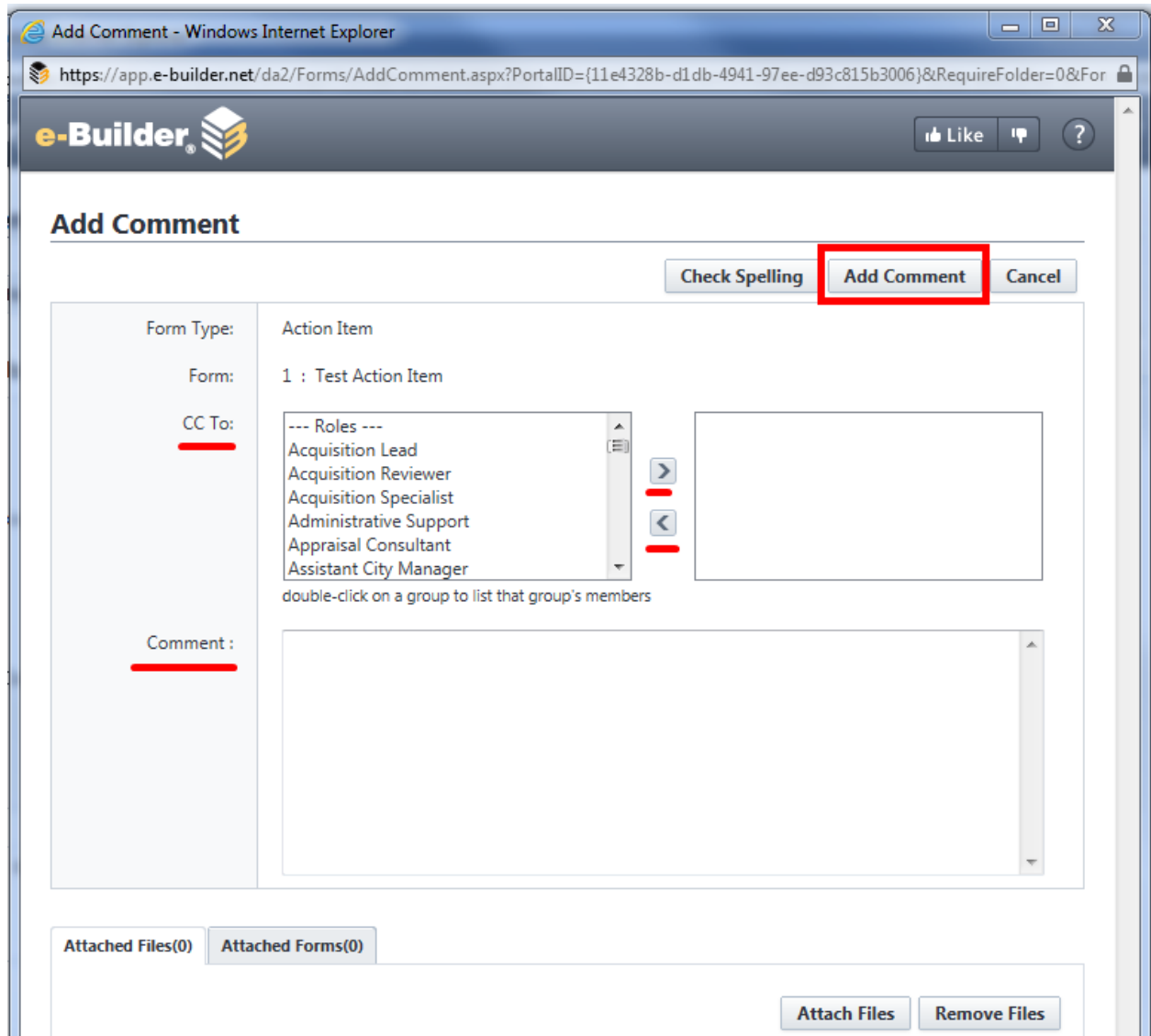
Project:	Dan- e-Builder Test
Author:	Edge, Dan
Counter Prefix:	<input type="text"/>
Priority:	Normal
Subject:	<input type="text" value="Test Action Item"/>
Date Created:	07.16.2013 10:48am
Held By:	Edge, Dan
Date Due:	<input type="text" value="07.24.2013"/> 

[Action Item](#) [Comments \(1\)](#) [Attached Files \(0\)](#) [Attached Forms \(0\)](#) [Attached To](#)

Show : [Comment](#) [Fax Comment](#) [Request External Comment](#)

Form Filled Out

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.

Forms for Dan- e-Builder Test - 1234

Filter Forms

[Fill Out Form](#)

Project Name:	Dan- e-Builder Test		
Type of Form:	Workflow in Your Court <input type="checkbox"/> Open <input checked="" type="checkbox"/> Closed		
Containing Text:	<input style="width: 100%;" type="text"/> anywhere in the form		

[Filter](#)

Workflow Forms In Your Court

Page 1 of 1 Show 25

Subject					
Prefix	#	Author	Held By	Due Date	Status
Action Item : Test Action Item	1	Dan Edge e-Builder, Inc.	Dan Edge e-Builder, Inc.	07.24.2013	5.6d early
<i>Action Item : [No Subject]</i>					
		<i>Dan Edge</i>	<i>N/A</i>	<i>N/A</i>	<i>DRAFT</i>

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

Action Item #3

[Edit Form](#)
[History](#)
[Form Field History](#)
[Permissions](#)

Tip: Go to comments tab to add or request a comment.

Form Details
[Save](#)
[Forward](#)
Reply
[Print](#)
[Copy](#)
[Fill Out Form](#)
[Check Spelling](#)
[Cancel](#)

Project:	Dan- e-Builder Test
Author:	Edge, Dan
Counter Prefix:	
Priority:	Normal
Subject:	TEST Action Item
Date Created:	07.16.2013 11:09am
Held By:	Edge Test, Dan
Date Due:	07.25.2013

Action Item
[Comments \(1\)](#)
[Attached Files \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To](#)

*** Action Requested:** Please reply to this form

Action Response:



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.

The screenshot shows a web browser window titled "Edit Form - Windows Internet Explorer" displaying the e-Builder interface. The URL is <https://app.e-builder.net/da2/forms/ViewEditForm.aspx?FormID={3afb666b-aad2-4c91-b581-e1a502b9a9b2}&PortalID={11e4328b-d1db-4941-97ee-d93c815b3006}>. The page title is "Action Item #3".

Navigation tabs include "Edit Form", "History", "Form Field History", and "Permissions". A tip states: "Tip: Go to comments tab to add or request a comment." Below these are "Form Details" tabs: "Save", "Forward", and "Reply". Action buttons include "Print", "Copy", "Fill Out Form", "Check Spelling", and "Cancel".

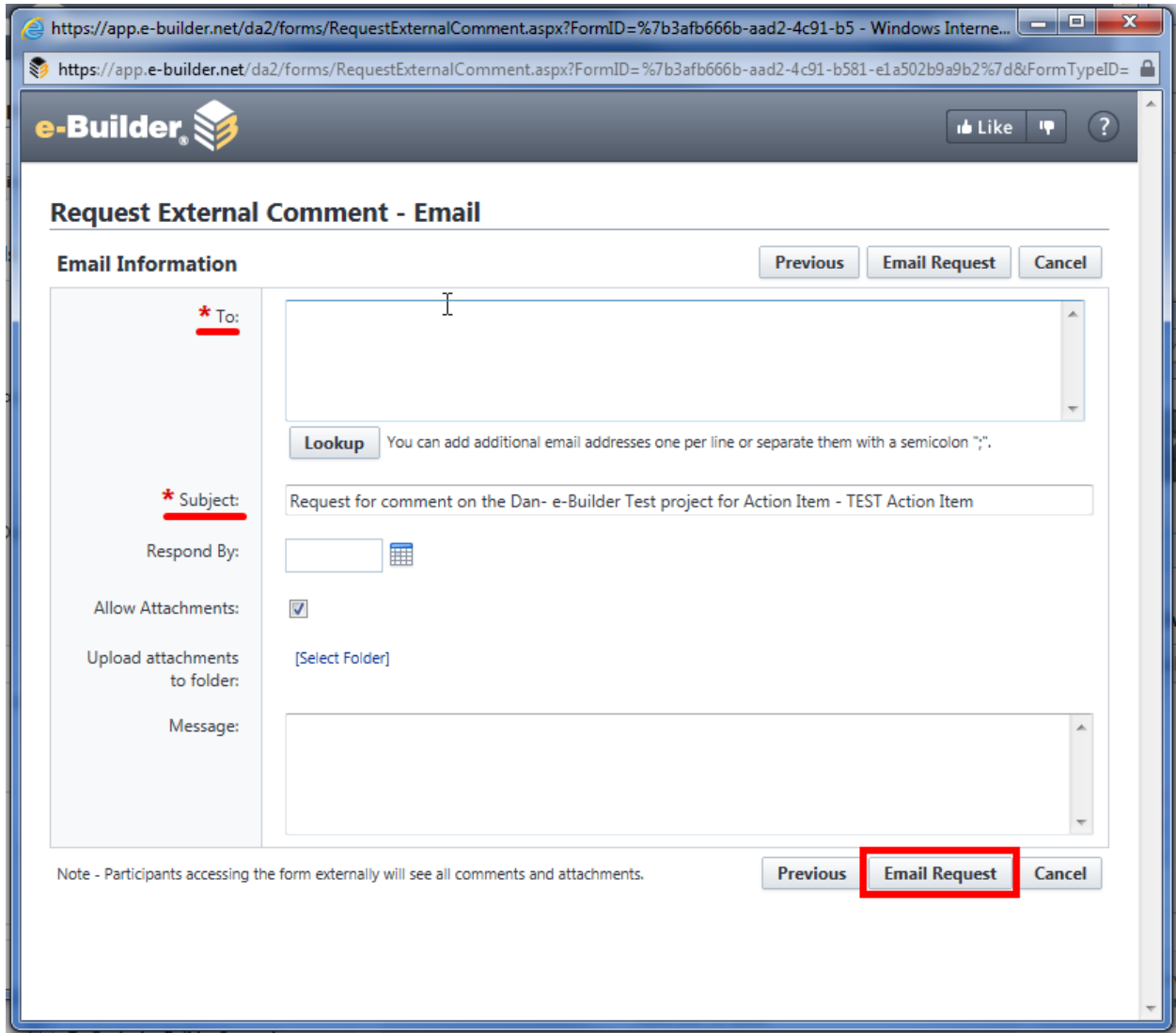
The "Form Details" section contains the following information:

Project:	Dan- e-Builder Test
Author:	Edge, Dan
Counter Prefix:	
Priority:	Normal
Subject:	TEST Action Item
Date Created:	07.16.2013 11:09am
Held By:	Edge Test, Dan
Date Due:	07.25.2013

Below the form details are tabs for "Action Item", "Comments (1)", "Attached Files (0)", "Attached Forms (0)", and "Attached To". The "Comments (1)" tab is selected. Action buttons include "Comment", "Fax Comment", and "Request External Comment", with the latter highlighted by a red box.


The "Request External Comment" button is highlighted with a red box. Below it, a "Form Filled Out" notification is visible, dated "Dan Edge, e-Builder, Inc., 07.16.2013 11:09AM". The recipient information is "To : Dan Edge Test, e-Builder".

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>
to me ▾

11:16 AM (0)

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.

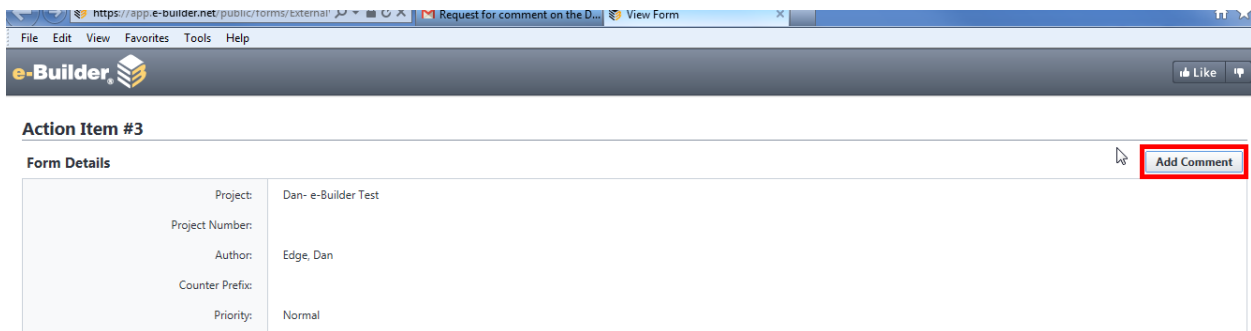
e-Builder Technical Support

phone: [1-888-288-5717](tel:1-888-288-5717) | fax: [1-800-576-9322](tel:1-800-576-9322)

support@e-builder.net

|

 [Click here to Reply or Forward](#)



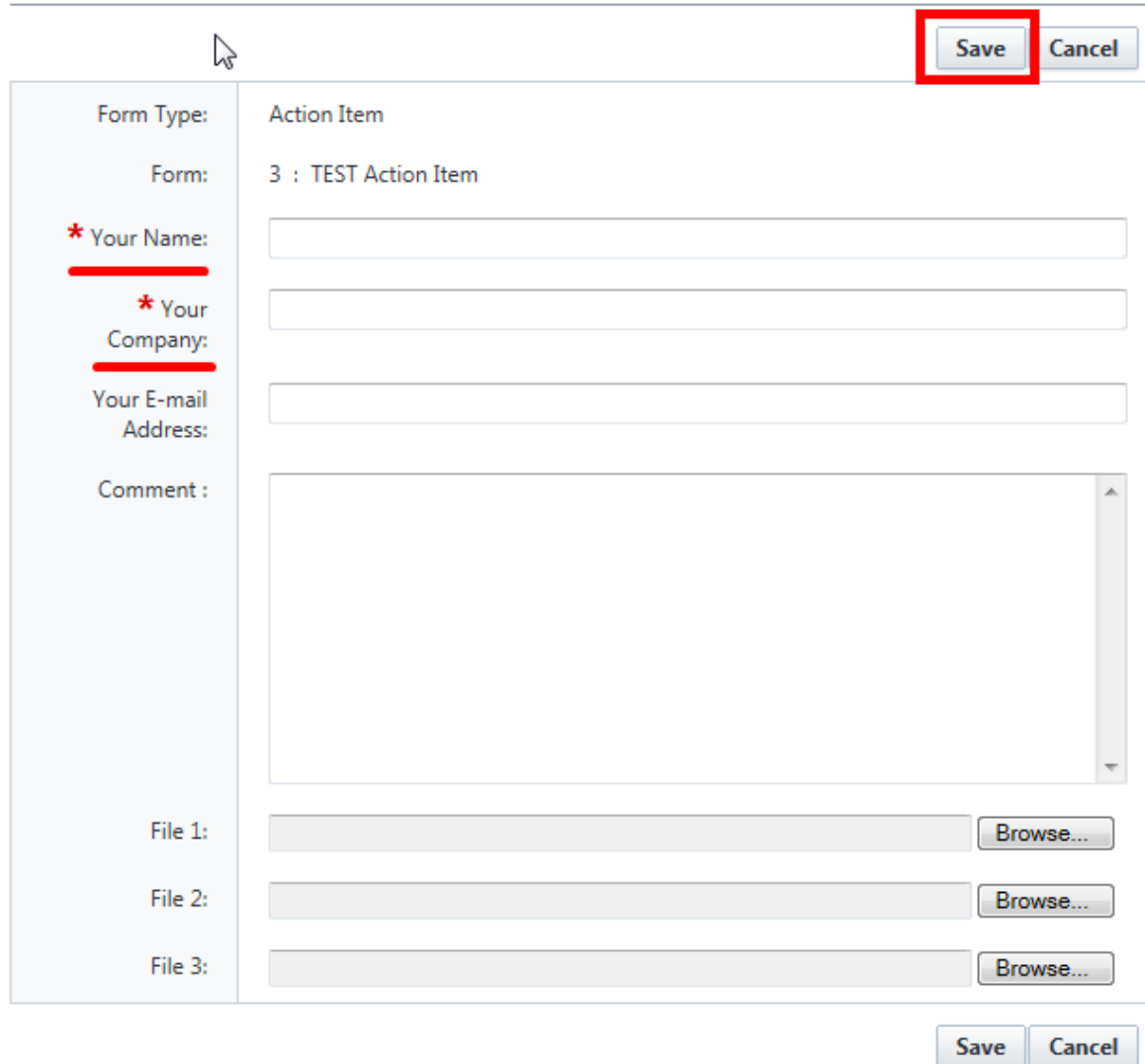
Action Item #3

Form Details

Project:	Dan- e-Builder Test
Project Number:	
Author:	Edge, Dan
Counter Prefix:	
Priority:	Normal

[Add Comment](#)

Add Comment



Form Type: Action Item

Form: 3 : TEST Action Item

* Your Name:

* Your Company:

Your E-mail Address:

Comment :

File 1: Browse...

File 2: Browse...

File 3: Browse...

Save Cancel

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 .

Action Item #3

View Form | History | Form Field History | **Permissions**

Permissions OK Cancel

As owner of this Form, Dan Edge has full permissions on this object. Additional permissions are listed below.

Add | Remove | List Members

- LDD Test Project added by DEW / Administrators
- LDD Test Project added by DEW / Members
- Edge Test, Dan (dedgetest)
- Edge, Dan (dedge)

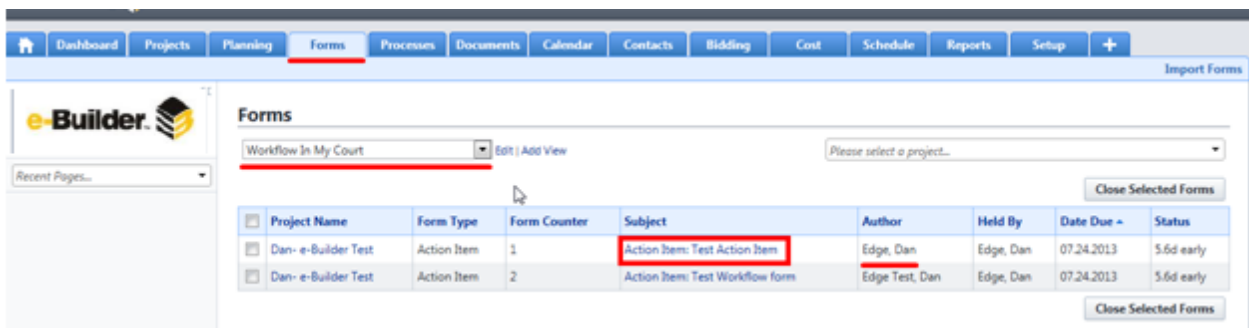
View = This user or group may view this Action Item.
 Comment = This user or group may add comments to this Action Item.
 Redline Markup = This permission does not apply directly to forms, but the user or group will be able to redline markup files attached to the form.
 Modify = This user or group may update dynamic fields in this Action Item.
 CC Users = This user or group may CC others when replying, forwarding, or adding a comment.
 No Access = The user or group has no access to this Action Item. This permission setting overrides any other permissions the user or group may be granted.

OK Cancel

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.



Workflow In My Court Edit | Add View Please select a project... Close Selected Forms

Project Name	Form Type	Form Counter	Subject	Author	Held By	Date Due	Status
Dan- e-Builder Test	Action Item	1	Action Item: Test Action Item	Edge, Dan	Edge, Dan	07.24.2013	5.6d early
Dan- e-Builder Test	Action Item	2	Action Item: Test Workflow form	Edge Test, Dan	Edge, Dan	07.24.2013	5.6d early

Close Selected Forms

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.

Action Item #1

Edit Form History Form Field History Permissions

Tip: Go to comments tab to add or request a comment.

Form Details Save Forward Close
Print Copy Fill Out Form Check Spelling Cancel

Project: Dan- e-Builder Test
 Author: Edge, Dan
 Counter Prefix:

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.

Close Form

Close Form Check Spelling Cancel

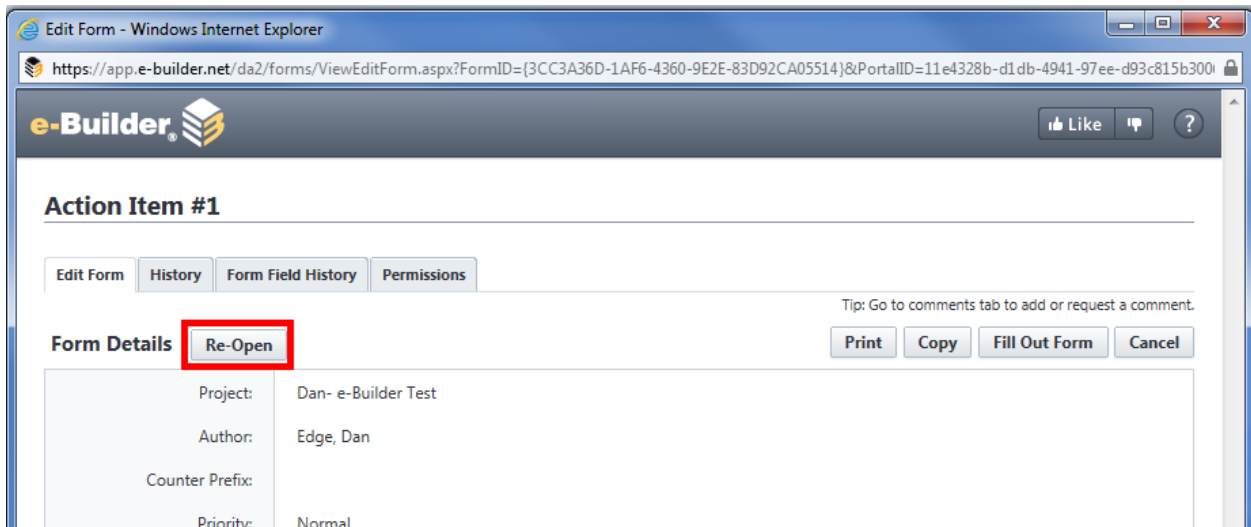
Form: Action Item #1
 Subject: Test Action Item
 Comment: Action complete. Issue is resolved.

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.

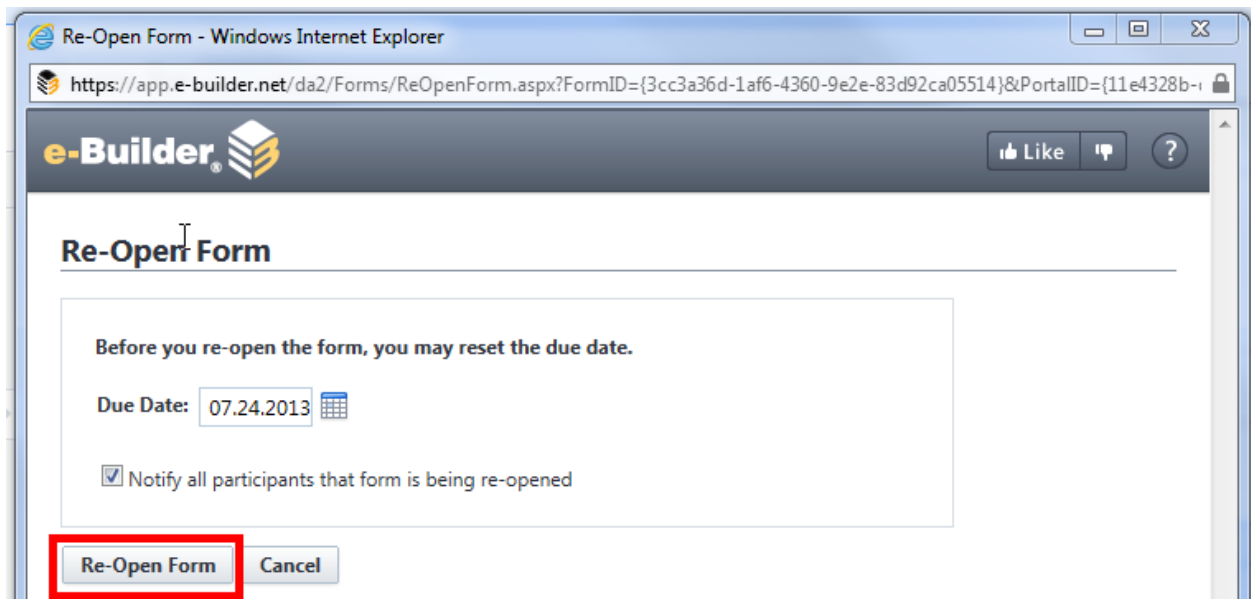
The screenshot shows the 'Forms' tab in the e-Builder interface. The 'Filter Forms' section is active, with 'Project Name' set to 'Dan- e-Builder Test' and 'Type of Forms' set to 'Workflow in Your Court'. The 'Closed' checkbox is checked, and the 'Filter' button is highlighted. Below the filter, a table titled 'Workflow Forms In Your Court' displays a list of forms. The first row, 'Action Item : Test Action Item', is shaded in light blue, indicating it is closed.

Prefix	#	Author	Held By	Due Date	Status
Action Item : Test Action Item	3	Dan Edge e-Builder, Inc.	Dan Edge e-Builder, Inc.	07.24.2013	5.6d early

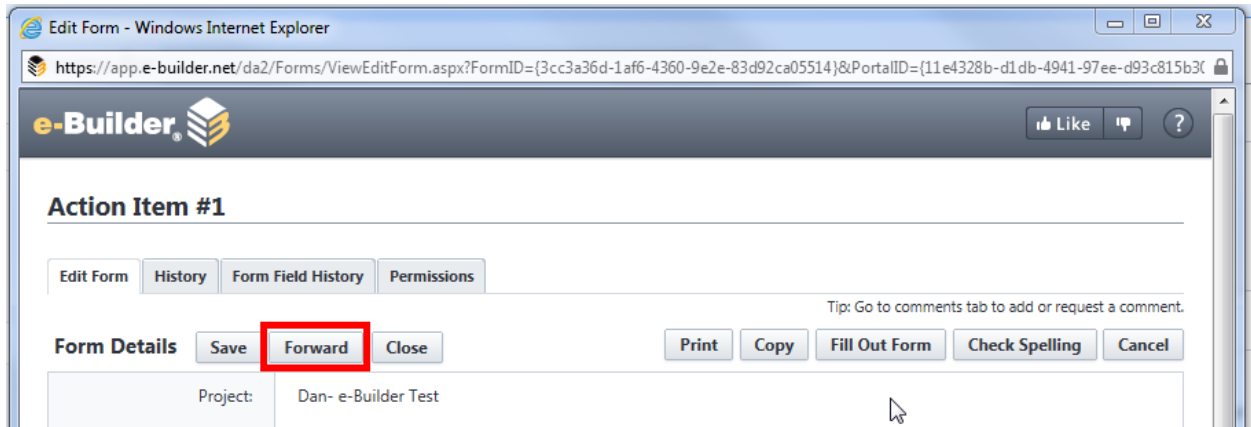
8. To Re-Open a form, select the closed form and click **Re-Open**.



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



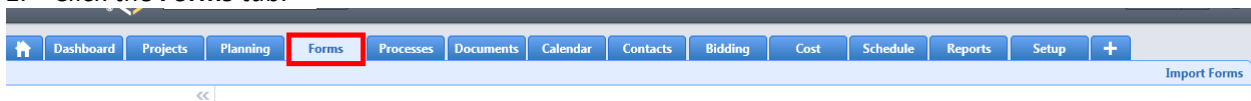
10. The form is placed in the User's court. The user may now forward this form to any relevant persons.



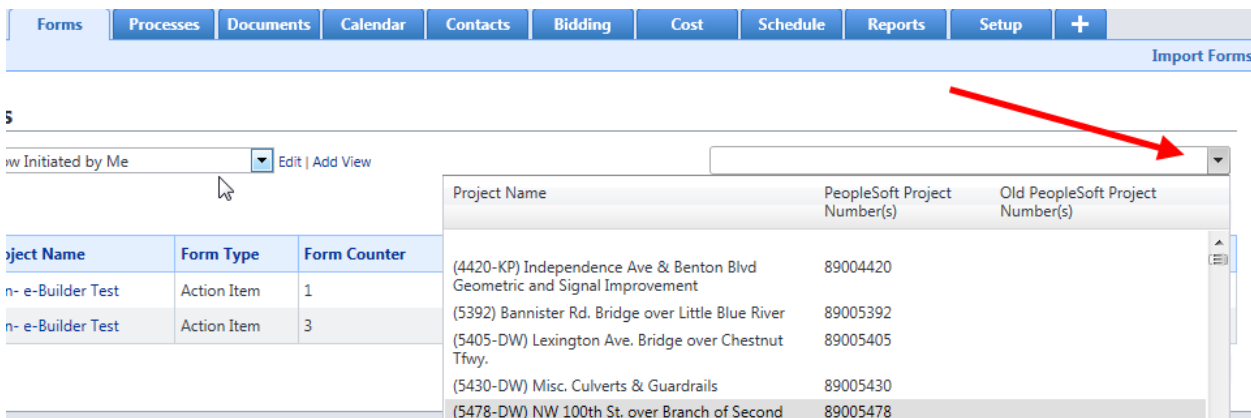
Using Form Filters

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.)

Forms for

Filter Forms Fill Out Form

Project Name:	Dan- e-Builder Test	
Type of Form:	<input type="text" value="Workflow in Your Court"/> <input type="checkbox"/> Open <input checked="" type="checkbox"/> Closed	
Containing Text:	<input type="text" value="Workflow in Your Court"/> <input type="text" value="anywhere in the form"/>	<input type="button" value="Filter"/>

Note: A dropdown menu is open under 'Type of Form' showing options: Workflow in Your Court (highlighted), Workflow You Initiated, All Workflow and Static Forms, -- Only Workflow Forms, ---- Action Item, ---- Architect's Supplemental Instructions, ---- Bulletin, ---- Decision Review.

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

Forms for

Filter Forms Fill Out Form

Project Name:	Dan- e-Builder Test	
Type of Form:	<input type="text" value="Workflow in Your Court"/> <input type="checkbox"/> Open <input checked="" type="checkbox"/> Closed	
Containing Text:	<input type="text" value=""/> <input type="text" value="anywhere in the form"/>	<input type="button" value="Filter"/>

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)

Forms for

Filter Forms Fill Out Form

Project Name:	Dan- e-Builder Test	
Type of Form:	<input type="text" value="Workflow in Your Court"/> <input type="checkbox"/> Open <input checked="" type="checkbox"/> Closed	
Containing Text:	<input type="text" value=""/> <input type="text" value="anywhere in the form"/>	<input type="button" value="Filter"/>

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

Forms for

Filter Forms

[Fill Out Form](#)

Project Name: Dan- e-Builder Test

Type of Form: Open Closed

Containing Text: anywhere in the form

Filter

Workflow Forms In Your Court

Page 1 of 1 Show 25

Prefix	#	Author	Held By	Due Date	Status
Action Item : Test Workflow form					
	2	Dan Edge Test e-Builder	Dan Edge e-Builder, Inc.	07.24.2013	5.5d early
Action Item : Test Action Item					
	1	Dan Edge e-Builder, Inc.	Dan Edge e-Builder, Inc.	07.24.2013	5.5d early
Action Item : [No Subject]					
		Dan Edge e-Builder, Inc.	N/A N/A	N/A	DRAFT

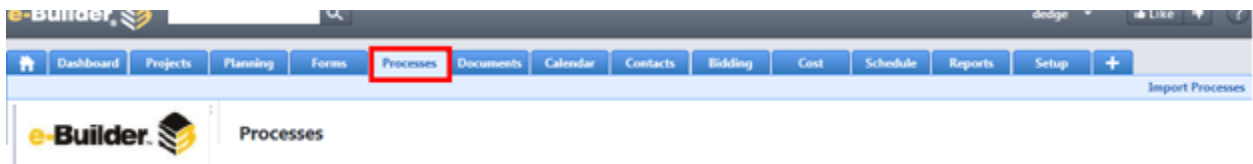
Process Module

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.

Process Name	Description
Bid Recommendation (BIDRC)	
Budget Approval / Change Process (BAC)	
Change Order Process (CO)	
Commitment Approval Process (CAP)	
Condemnation Process (CDMN)	
GC Payment Application Process (GCPA)	
General Contractor Request for Information (GCRFI)	
Invoice Approval Process (INV)	
Ordinance (ORD)	

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

Change Order Process (CO)

Start Process Print Check Spelling Submit Save Draft Cancel

Project: Dan - e-Builder Test
 Process: Change Order Process
 * Subject:

Details **Attached Documents (0)** Attached Processes (0) Attached Forms (0)

* Description of Change:

* Schedule Impact: (In Days)

Ordinance/Resolution

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**

* Subject:

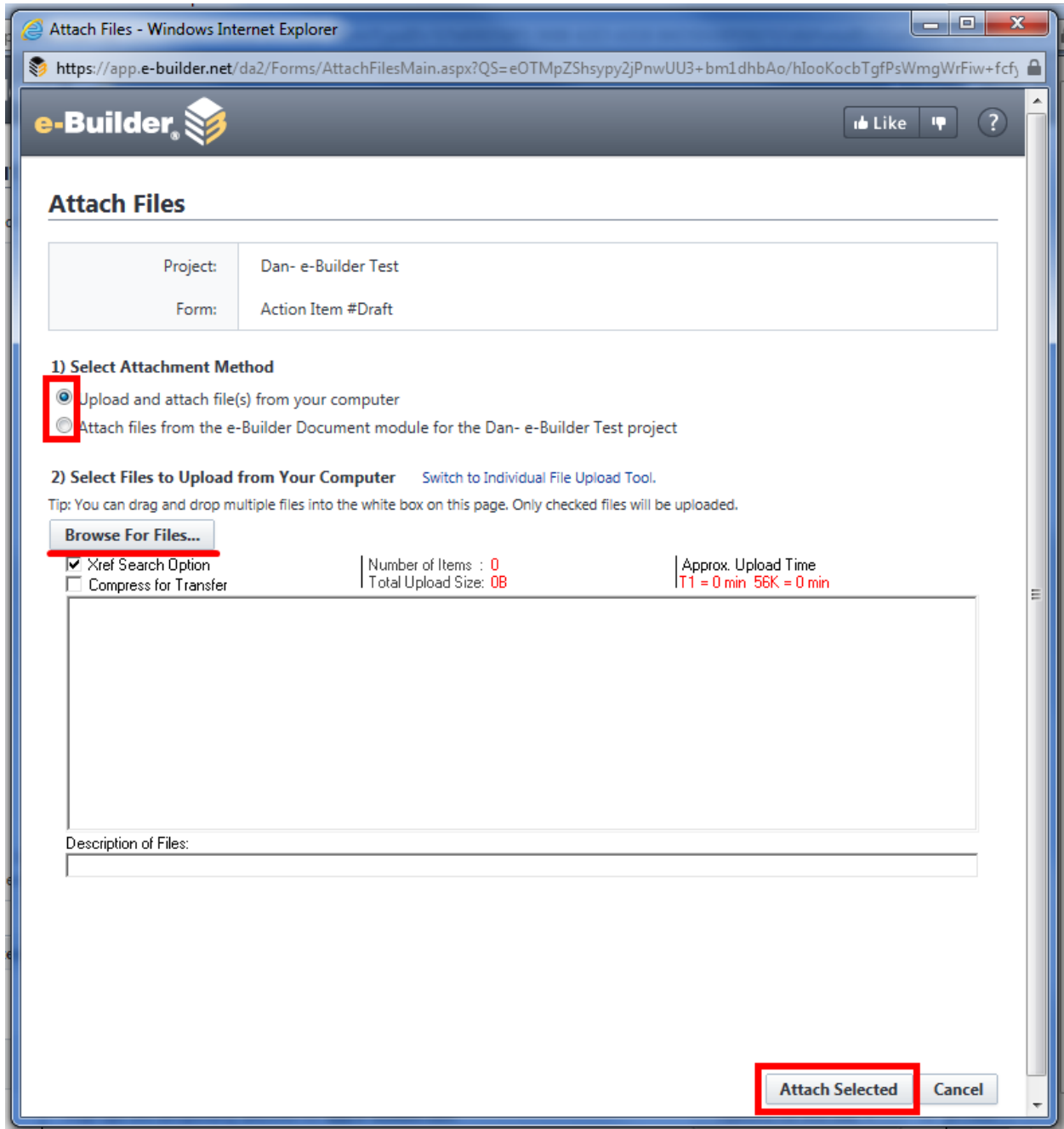
Details **Attached Documents (0)** Attached Processes (0) Attached Forms (0)

Attach Documents Remove

File Name	Attached By
There are no documents attached to this process.	

Attach Documents Remove

Print Check Spelling Submit Save Draft Cancel



Attach Files - Windows Internet Explorer

https://app.e-builder.net/da2/Forms/AttachFilesMain.aspx?QS=eOTMpZShsypy2jPnwUU3+bm1dhbAo/hIooKocbTgfPsWmgWrFiw+fcf

e-Builder

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.

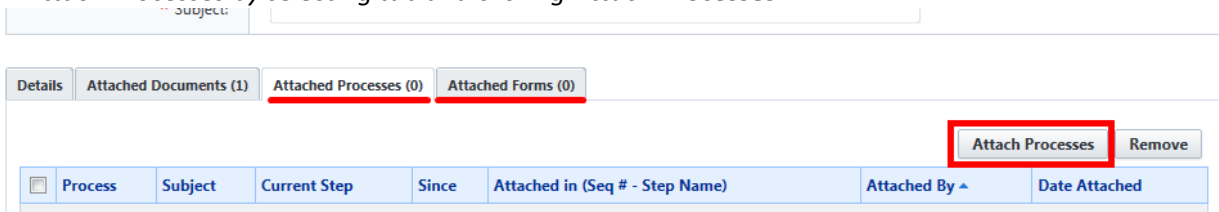
Browse For Files...

Xref Search Option | Number of Items : 0 | Approx. Upload Time
 Compress for Transfer | Total Upload Size: 0B | T1 = 0 min 56K = 0 min

Description of Files:

Attach Selected Cancel

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



subject: _____

Details Attached Documents (1) **Attached Processes (0)** Attached Forms (0)

Attach Processes Remove

Process	Subject	Current Step	Since	Attached in (Seq # - Step Name)	Attached By	Date Attached

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

Change Order Process (CO)

Start Process Print Check Spelling **Submit** Save Draft Cancel

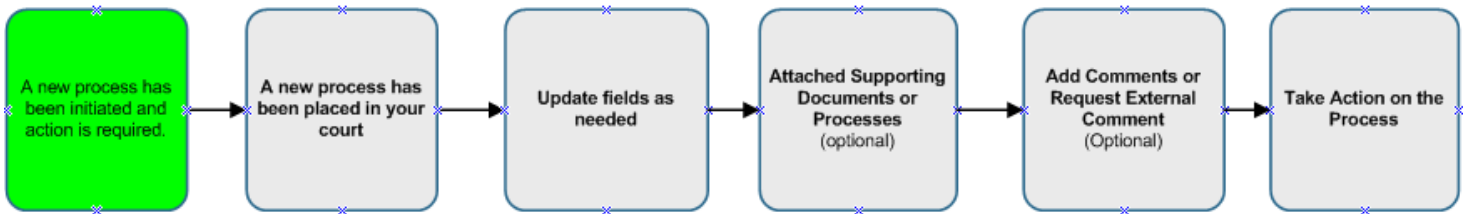
Project: Dan- e-Builder Test
 Process: Change Order Process
 * Subject:

Details Attached Documents (1) Attached Processes (0) Attached Forms (0)

* Description of Change:

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

Responding to a Process



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

Processes for Dan- e-Builder Test - 1234

Filter Processes Start Process

Type of Process: Processes in My Court Draft Open Finished
 Status: All Statuses
 Containing Text:

Filter

Page 1 of 1 Show 25

Process	Subject	Step	In Step Since	Date Due ^	Status
WCD - 1	Test WCD Process	Design Professional Review	07.16.2013		Submitted

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

Processes for Dan- e-Builder Test - 1234

Filter Processes Start Process

Type of Process:	Processes in My Court <input checked="" type="checkbox"/> Draft <input checked="" type="checkbox"/> Open <input type="checkbox"/> Finished
Status:	All Statuses
Containing Text:	<input type="text"/>

Filter

Page 1 of 1 Show 25

Process	Subject	Step	In Step Since	Date Due	Status
WCD - 1	Test WCD Process	Design Professional Review	07.16.2013		Submitted

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**.

Work Change Directive (WCD) - 1 Delete Instance Workflow Override All Fields View

Accept Decline
-- Please select an action --
Take Action
Check Spelling Print Copy Delegate Save Cancel

Project: Dan- e-Builder
 Process Document: WCD - 1
 Overall Due Date:

Adding a Comment

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

* Subject: Test WCD Process

Status: Submitted

Details Comments (0) Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Request Comment Comment

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

Add Comment

Add Comment

Add Comment
Check Spelling
Cancel

Process: Work Change Directive #1 : Test WCD Process

Private:

*** Comment :**

Attached Documents (0)
Attached Processes (0)
Attached Forms (0)

Attach Documents Remove

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**.

Work Change Directive (WCD) - 1

Delete Instance
Workflow Override
All Fields View

Accept
Decline

-- Please select an action --
Take Action

Check Spelling
Print
Copy
Delegate
Save
Cancel

Project:	Dan- e-Builder Test		
Process Document:	WCD - 1 Show Routing History Current Actors	Overall Due Date:	
Current Workflow Step:	Design Professional Review Show Workflow Diagram	Step Due Date:	
* Subject:	<input type="text" value="Test WCD Process"/>		
Status:	Submitted		

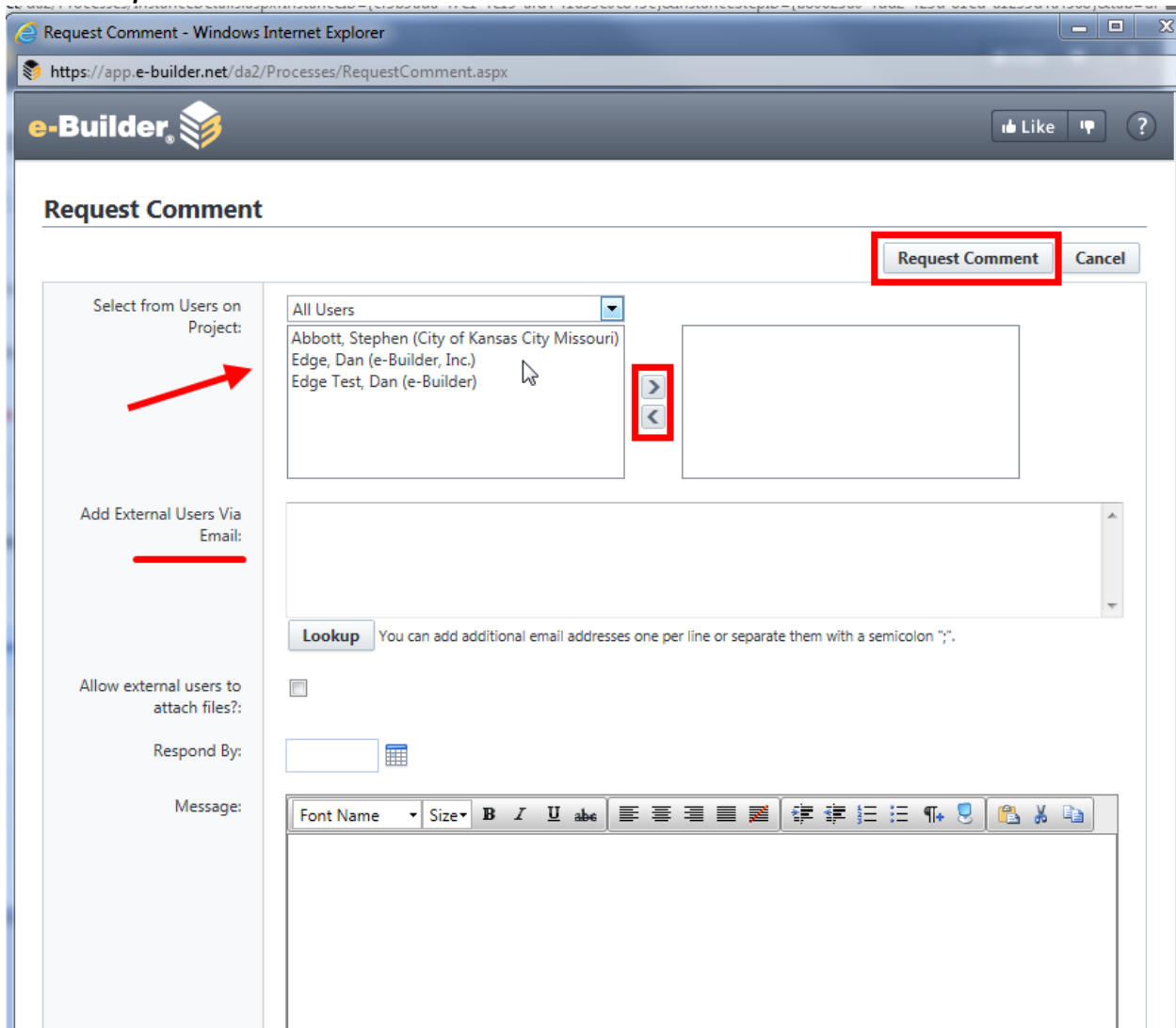
Details
Comments (0)
Attached Documents (0)
Attached Processes (0)
Attached Forms (0)
Attached To (0)

Request Comment

Comment

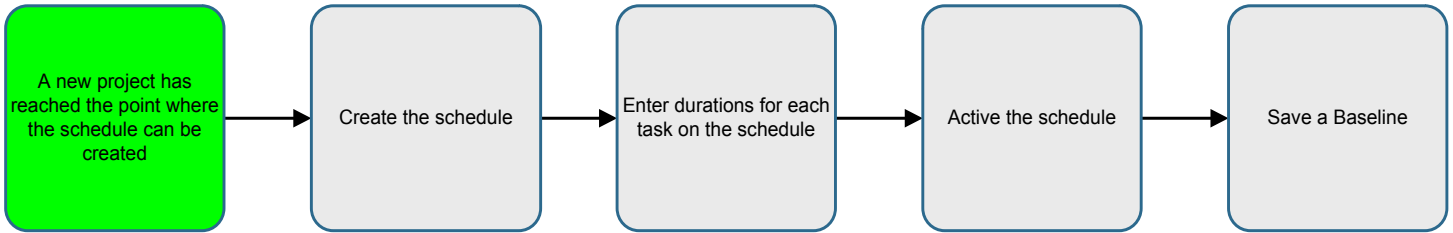
Private Comment ▾

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.



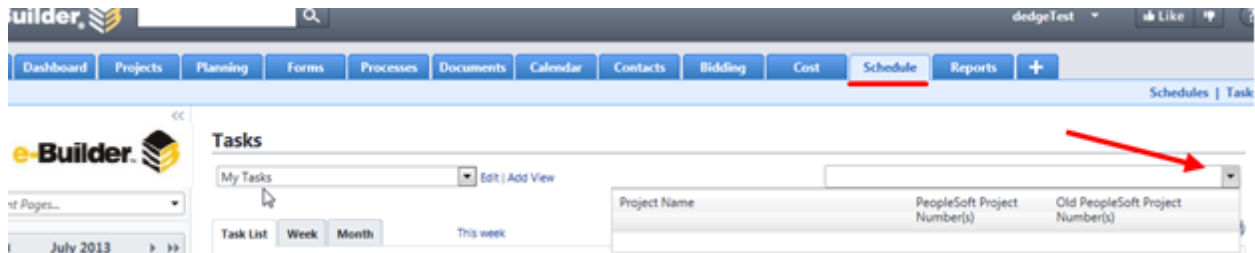
Schedule Module

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.



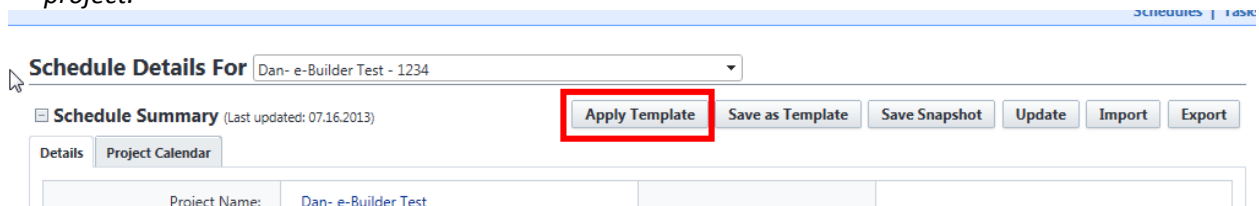
2. Select the project you need to create the schedule for.
3. Input required schedule information (if prompted), click **Create**.

Create a Schedule

Please create a Schedule for Dan- e-Builder Test **Create** Cancel

<p>* Start Date: 07.17.2013</p> <p>* Hours per day: 8</p> <p>* Hours per week: 40</p> <p>* Days per month: 20</p> <p>* Manager Role: Design Professional</p> <p>* Manager User: Edge, Dan <small>There are no users for this role.</small></p> <p>Use External Scheduler: No</p>	<p>Work Day Start Time: 8:00am</p> <p>Work Day End Time: 4:00pm</p> <p>Work Week: <input checked="" type="checkbox"/> <ul style="list-style-type: none"> <input type="checkbox"/> Sunday <input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input type="checkbox"/> Saturday </p>
--	---

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



Apply Template

Please select a Template:

Please Select...

Please Select...

KCMO Full Schedule

KCMO Small Schedule

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

Apply Template

Apply a Template

Name: KCMO Full Schedule

Description:

Current Duration: 8h

Duration after applying to schedule: 8h

* Choose where to add the template:

Add as a last activity in the schedule

Insert above Please select...

Insert below Please select...

* Actual Duration: Weeks

* Add as a Draft?:

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.

Use External Scheduler: INU

Tasks (85) Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0) Snapshots (0) History (0)

Task View ▲ ▼ ◀ ▶ Add Task Actions

	#	Task Name	Duration	Start	Finish	% Complete	Pr	
<input checked="" type="checkbox"/>	1	Overall Project Schedule	1d	07.17.2013	07.17.2013	0%		
<input checked="" type="checkbox"/>	2	Pre-Design	1d	07.17.2013	07.17.2013	0%		
<input checked="" type="checkbox"/>	3	Pre-Design Procurement	1d	07.17.2013	07.17.2013	0%		
<input checked="" type="checkbox"/>	4	HRD Participation Goals	1d	07.17.2013	07.17.2013	0%		
<input checked="" type="checkbox"/>	5	Advertising	1d	07.17.2013	07.17.2013	0%		

Update Tasks

Delete

Save Baseline

Activate

Complete

Reassign

3. Click "Activate" to confirm

Confirm Activations

Dan- e-Builder Test

Selected Tasks
 HRD Participation Goals
 Overall Project Schedule
 Pre-Design Procurement
 Pre-Design

Activate
Cancel

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

Task View	#	Task Name	Duration	Start	Finish	% Complete	Predecessors
	1	Overall Project Schedule	1d	07.17.2013	07.17.2013	0%	
Baseline not set	2	Pre-Design	1d	07.17.2013	07.17.2013	0%	
	3	Pre-Design Procurement	1d	07.17.2013	07.17.2013	0%	
	4	HRD Participation Goals	1d	07.17.2013	07.17.2013	0%	
	5	Advertising	1d	07.17.2013	07.17.2013	0%	
	6	Pre-Bid Proposal	1d	07.17.2013	07.17.2013	0%	

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.

Task View	#	Task Name	Duration	Start	Finish	% Complete	Pr
	<input checked="" type="checkbox"/> 1	Overall Project Schedule	1d	07.17.2013	07.17.2013	0%	
	<input checked="" type="checkbox"/> 2	Pre-Design	1d	07.17.2013	07.17.2013	0%	
	<input checked="" type="checkbox"/> 3	Pre-Design Procurement	1d	07.17.2013	07.17.2013	0%	
	<input type="checkbox"/> 4	HRD Participation Goals	1d	07.17.2013	07.17.2013	0%	
	<input type="checkbox"/> 5	Advertising	1d	07.17.2013	07.17.2013	0%	

Add Task

 Actions

- Update Tasks
- Delete
- Save Baseline
- Activate
- Complete
- Reassign

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

Confirm Baselines

Dan- e-Builder Test

Overall Project Schedule
Pre-Design
Pre-Design Procurement

Save Baseline
Cancel

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

Tasks (85) Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0) Snapshots (1) History (5)									
Task View [dropdown] [up] [down] [left] [right] [Add Task] [Actions]									
#	Task Name	Duration	Start	Finish	% Complete	Predecessors			
1	Overall Project Schedule	1d	07.17.2013	07.17.2013	0%				
2	Pre-Design	1d	07.17.2013	07.17.2013	0%				
3	Pre-Design Procurement	1d	07.17.2013	07.17.2013	0%				
4	HRD Participation Goals	1d	07.17.2013	07.17.2013	0%				
5	Advertising	1d	07.17.2013	07.17.2013	0%				
6	Pre-Bid Proposal	1d	07.17.2013	07.17.2013	0%				
7	Proposals Received Opening	1d	07.17.2013	07.17.2013	0%				

Updating Tasks

1. Click on the name of a task.

Tasks (85) Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0) Snapshots (2) History (87)									
Task View [dropdown] [up] [down] [left] [right] [Add Task] [Actions]									
#	Task Name	Duration	Start	Finish	% Complete	Predecessors			
1	Overall Project Schedule	1d	07.17.2013	07.17.2013	0%				
2	Pre-Design	1d	07.17.2013	07.17.2013	0%				
3	Pre-Design Procurement	1d	07.17.2013	07.17.2013	0%				
4	HRD Participation Goals	1d	07.17.2013	07.17.2013	0%				
5	Advertising	1d	07.17.2013	07.17.2013	0%				
6	Pre-Bid Proposal	1d	07.17.2013	07.17.2013	0%				
7	Proposals Received Opening	1d	07.17.2013	07.17.2013	0%				

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

Task Details

Task Details		Update	Cancel	Complete
Task:	1 - Overall Project Schedule 2 - Pre-Design 3 - Pre-Design Procurement 4 - HRD Participation Goals ←			
Project:	Dan- e-Builder Test			
Process:	N/A	Milestone?	No	
Approval Required for Date Changes:	No	RollUp?	No	
Approval Required for Work Complete Changes:	No			

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

Update Details

Task Details		Save	Cancel
* Task:	4 - HRD Participation Goals		
Project:	Dan- e-Builder Test		
Process:	N/A	Master Activity:	Please select... ▾
Draft:	<input type="checkbox"/>	Type:	Task ▾
Milestone?:	<input type="checkbox"/>	Status:	<input checked="" type="checkbox"/> On Schedule
Approval Required for Date Changes:	<input type="checkbox"/>		
Approval Required for Work Complete Changes:	No ▾		

Schedule Details

Start:	<input type="text"/>	* Work Complete:	0 %
Finish:	<input type="text"/>	* Duration:	6 Days ▾
Current Dates:	07.17.2013 - 07.17.2013 8h duration	Original Baseline:	07.17.2013 - 07.17.2013 1d duration
Constraint Type:	As Soon As Possible ▾	Constraint Date:	<input type="text"/>

Who is Responsible?

Task Resource Role:	Please select... ▾	Task Manager Role:	Please select... ▾
Task Resource:	Please select... ▾	Task Manager:	Please select... ▾

Custom Fields

Description	Predecessors

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.

Tasks (85) Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0) Snapshots (2) History (88)

Task View [dropdown] [up] [down] [left] [right] Add Task Actions [dropdown]

#	Task Name	Duration	Start	Finish	% Complete	Pr
1	Overall Project Schedule	6d	07.17.2013	07.24.2013	0%	
2	Pre-Design	6d	07.17.2013	07.24.2013	0%	
3	Pre-Design Procurement	6d	07.17.2013	07.24.2013	0%	
4	HRD Participation Goals	6d	07.17.2013	07.24.2013	0%	
5	Advertising	1d	07.17.2013	07.17.2013	0%	
6	Pre-Bid Proposal	1d	07.17.2013	07.17.2013	0%	
7	Proposals Received Opening	1d	07.17.2013	07.17.2013	0%	

Actions menu: Update Tasks, Delete, Save Baseline, Activate, Complete (highlighted), Reassign

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.

Calendar For: Dan- e-Builder Test

Month Week Work Week Day Upcoming Events

Today [calendar icon]

July 15 - July 19

	Mon, Jul 15	Tue, Jul 16	Wed, Jul 17	Thu, Jul 18	Fri, Jul 19
all day					
8am					
9am					

Add Event [button]

Lookup - Windows Internet Explorer
 https://app.e-builder.net/da2/Calendar/LookUp.aspx?Type=ctl00_ctl00_ContentPlaceholder1_contentSection_reqAttendees&ctlToUpdate=ctl00

e-Builder Like ?

Lookup (Select users/contacts to add below)

Filter Users/Contacts Users Only

First Name:

Username:

Project Contacts Only:

User Custom Fields:

Contact Custom Fields:

Last Name:

Company:

Filter

Insert Selected **Cancel**

<input type="checkbox"/>	First Name	Last Name	User Name	Company Name	Email
<input checked="" type="checkbox"/>	Dan	Edge	dedge	e-Builder, Inc.	dedge@e-builder.net
<input type="checkbox"/>	Dan	Edge Test	dedgetest	e-Builder	dedgetest@e-builder.net

Insert Selected **Cancel**

- 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.

Lookup You may add additional email addresses one per line.

Priority:

Custom Fields **Documents (0)** **Forms (0)** **Processes (0)**

There are no calendar event custom fields.

Check Spelling **Save** **Cancel**

Editing or Deleting an Event

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

Dashboard Projects Planning Forms Processes Documents **Calendar** Contacts Bidding Cost Schedule Reports Setup +

e-Builder

Calendar

All Calendar Events Edit | Add View

Month Week Work Week Day Upcoming Events

< > Today

Project Name	PeopleSoft Project Number(s)	Old PeopleSoft Project Number(s)
(4420-KP) Independence Ave & Benton Blvd Geometric and Signal Improvement	89004420	
(5392) Bannister Rd. Bridge over Little Blue River	89005392	

2. Click on the link with the event name.

Calendar For Dan- e-Builder Test

Month Week Work Week Day Upcoming Events Add Event

< > Today July 15 - July 19

	Mon, Jul 15	Tue, Jul 16	Wed, Jul 17	Thu, Jul 18	Fri, Jul 19
all day					
8am					
9am				9:00 AM Test KCMO Event	
10am					

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

Event Details

Event Overview

Delete **Edit** Copy Event Print

Project Calendar:	Dan- e-Builder Test
Subject:	Test KCMO Event
Date and Time:	Thurs Jul 18 09:00am - 10:00am
Location:	
Agenda / Description:	
Reminder:	No Reminder

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

Event Details

Event Overview

Delete Edit Copy Event Print

Project Calendar:	Dan- e-Builder Test
Subject:	Test KCMO Event
Date and Time:	Thurs Jul 18 09:00am - 10:00am
Location:	

Event Details

Are you sure you want to delete the event?

Add a note:

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.

Calendar For

Month Week Work Week Day Upcoming Events

< > Today

July 15 - July 19					
	Mon, Jul 15	Tue, Jul 16	Wed, Jul 17	Thu, Jul 18	Fri, Jul 19
all day					
8am					
9am				9:00 AM Test KCMO Event	
10am					

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

Privacy: Public

Buttons: Delete Edit Copy Event Print

Attendees (1) Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0)

Buttons: Add Attendee Update Attendance

E-mail Address	Type	Attendee Name ^	User Name	Company Name	Status	Role	Attended
dedge@e-builder.net	User	Dan Edge	dedge	e-Builder, Inc.	Accepted	Organizer	<input type="checkbox"/>

- 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.
- Click Save.

Update Attendance

List of Attendees

Buttons: Save Cancel

Attendee Name	User Name	Company Name	E-mail Address	Type	Status	Attended
Dan Edge	dedge	e-Builder, Inc.	dedge@e-builder.net	User	Accepted	<input checked="" type="checkbox"/>

Buttons: Save Cancel

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.

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

Navigation: Dashboard Projects Planning Forms Processes Documents **Calendar** Contacts Bidding Cost Schedule Reports Setup +

Calendar

All Calendar Events Edit | Add View

Project Name dropdown: PeopleSoft Project Number(s) Old PeopleSoft Project Number(s)

Calendar tabs: Month Week Work Week Day Upcoming Events

Calendar view: Today Mon, Jul 15 Tue, Jul 16

Project list:

Project Name	PeopleSoft Project Number(s)	Old PeopleSoft Project Number(s)
(4420-KP) Independence Ave & Benton Blvd Geometric and Signal Improvement	89004420	
(5392) Bannister Rd. Bridge over Little Blue River	89005392	

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

Calendar For: Dan- e-Builder Test

Calendar tabs: Month **Week** Work Week Day Upcoming Events

Calendar view: July 15 - July 19

	Mon, Jul 15	Tue, Jul 16	Wed, Jul 17	Thu, Jul 18	Fri, Jul 19
all day					
8am					

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

Calendar For

July 17 - August 16

30 Day Look Ahead

Day	Start Date	Start Time	Subject	Location	Project Name
Wednesday	07.17.13	09:00AM	Test KCMO Event		Dan- e-Builder Test

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

Calendar For

< > Today July 15 - July 19

	Mon, Jul 15	Tue, Jul 16	Wed, Jul 17	Thu, Jul 18	Fri, Jul 19
all day					
8am					

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.

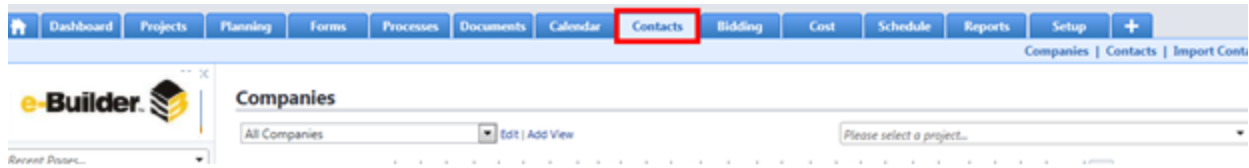
Companies | Contacts | Import Contact

Companies

Company Name	Company Number	City	State	Phone	Primary Contact
Industrial Salvage	IND001				
KCMO Historical	KCMO001				

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**.

Companies

All Companies

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | 0-9 | All

Company Name ^	Company Number	City	State	Phone	Primary Contact
Industrial Salvage	IND001				

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**

Add Contact

Contact Information

<p>* First Name: <input type="text" value="Prefix"/></p> <p>* Last Name: <input type="text"/></p> <p>* Company: <input type="text"/></p> <p>Company Number: <input type="text"/></p> <p>Country: <input type="text"/></p> <p>Address 1: <input type="text"/></p> <p>Address 2: <input type="text"/></p> <p>City: <input type="text"/></p> <p>State/Province: <input type="text"/></p> <p>Zip/Postal Code: <input type="text"/></p>	<p>Primary Contact?: <input type="checkbox"/> Yes</p> <p>Email: <input type="text"/></p> <p>Department: <input type="text"/></p> <p>Title: <input type="text"/></p> <p>Phone: <input type="text"/></p> <p>Mobile Phone: <input type="text"/></p> <p>Other Phone: <input type="text"/></p> <p>Fax: <input type="text"/></p> <p>Pager: <input type="text"/></p> <p>Do Not Use?: <input type="checkbox"/></p>
--	--

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**

Add Company

Company Information

* **Company:**

* **Company Number:**

Country:

Address:

Suite:

City:

State/Province:

County:

Zip/Postal Code:

Phone:

Fax:

Website URL:

Classifications:
 WBE
 MBE
 DBE

 VBE
 SBE
 Other

Is Prequalified?:

Do Not Use?:

Active:

 Allow commitments and invoices to be assigned to this company

 Allow contacts from this company to participate in bidding

Custom Fields (0) | Notes

There are no custom fields for this company.

- 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)

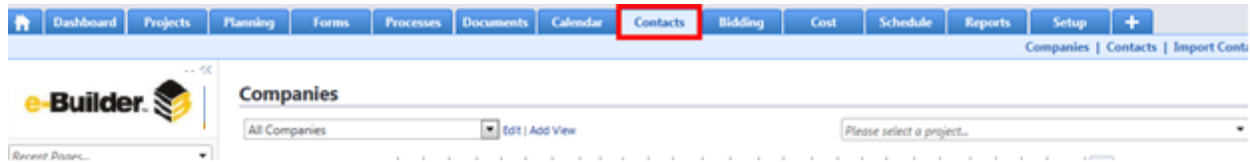
	A	B	C	D	E	F	G	H
1	<u>First name</u>	<u>Last name</u>	<u>Company</u>	<u>Phone</u>	<u>Email</u>			
2	Dan	Theman	e-Build	9549549544	d@gmail.com			
3								
4								
5								
6								
7								
8								

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

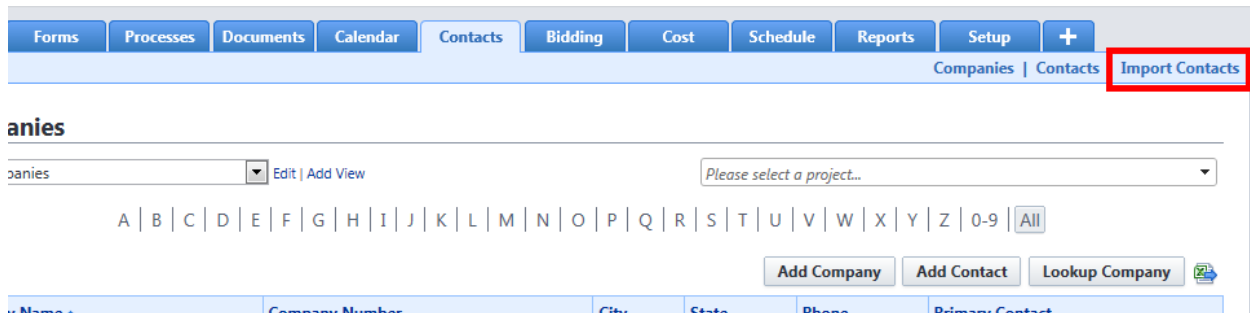


	A	B	C	D	E
1	Company	Address	ID	Phone	
2	Edge Elec	100 Hollywood	22	9549549595	
3					
4					
5					
6					

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.

Import Contacts - Select Import File

Step 1 of 3

How is your import file organized?

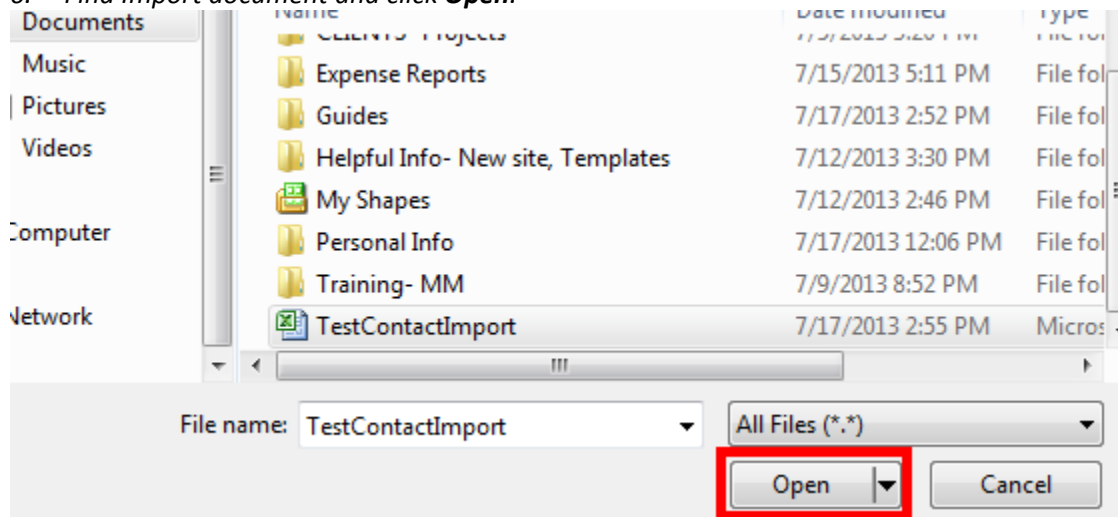
- Each row in my import file is a company
- Each row in my import file is a contact
- Update duplicates

Choose Your Import File

* Import File:

Note: Please select a .xls or .xlsx file to import.

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



7. Click **Next**.

Import Contacts - Select Import File

Step 1 of 3

How is your import file organized?

- Each row in my import file is a company
- Each row in my import file is a contact
- Update duplicates

Choose Your Import File

* Import File:

Note: Please select a .xls or .xlsx file to import.

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)

Company Built-In Fields

* Company:	Company	Phone:	Phone
Country:	Company	Fax:	
Address:	Email	Website URL:	
Suite:	First name	Classification - WBE:	
City:	Last name	Classification - MBE:	
County:	Phone	Classification - DBE:	
State/Province:		Classification - VBE:	
Zip/Postal Code:		Classification - SBE:	
Construction Codes:		Classification - Other:	
Company External ID:		Is Prequalified?:	
Company Number:		Do Not Use?:	
Active:			

Company Custom Fields

There are no company custom fields.

Contact Built-In Fields

Salutation:		Primary Contact?:	
* First Name:	First name	Email:	Email
* Last Name:	Last name	Title:	

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.)

Import File Summary

File Name: TestContactImport.xlsx	Each Row Is: Contact
Rows in File: 1	New Companies: 1
Rows To Be Imported: 1	New Contacts: 1
Rows To Be Updated: 0	Updated Companies: 0
Rows With Exceptions: 0	Updated Contacts: 0

Company Information

Company: e-Build	Phone: 9549549544
Country:	Fax:
Address:	Website URL:
Suite	Classification-WBE:
City:	Classification-MBE:
County:	Classification-DBE:
State/Province:	Classification-VBE:
Zip/Postal Code:	Classification-SBE:
Company External ID:	Classification-Other:
Company Number: EBU001	Is Prequalified?:
Construction Codes:	Do Not Use?:
Active: True	

Company Custom Fields

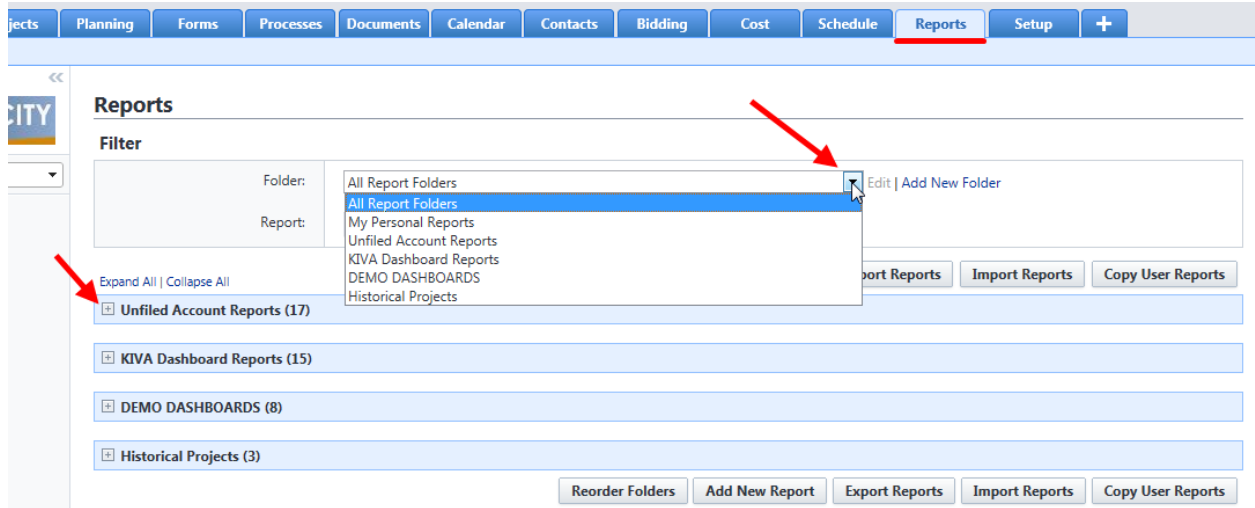
10. Once the mappings are verified and exceptions are corrected in the import file, click **Import**.

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.

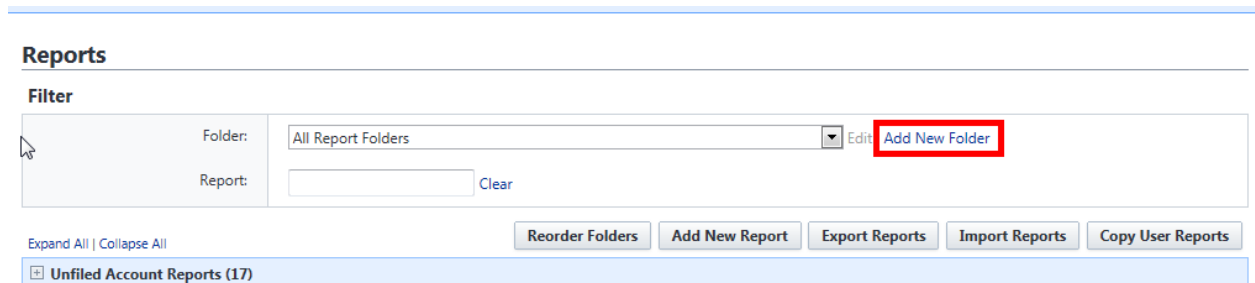


Organizing your Reports

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

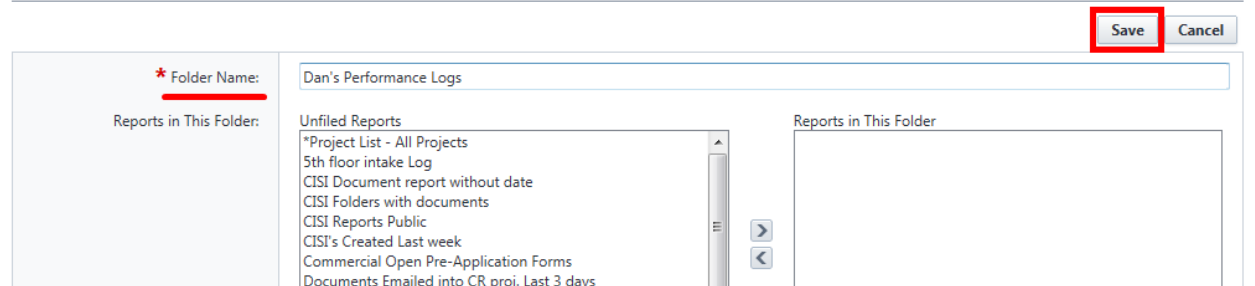
Creating a Report Folder

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



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

Add Report Folder



Reordering Report Folders

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

Reports

Filter

Folder:	All Report Folders	Edit Add New Folder
Report:	<input type="text"/>	Clear

Expand All | Collapse All

Reorder Folders Add New Report Export Reports Import Reports Copy User Reports

Unfiled Account Reports (17)

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.

Reorder Report Folders

Reorder Folders **Save** Cancel

KIVA Dashboard Reports	<input type="button" value="Top"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Bottom"/>
DEMO DASHBOARDS	
Historical Projects	

Save Cancel

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

Editing/Deleting a Folder

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

Reports

Filter

Folder:	All Report Folders	Edit Add New Folder
Report:	All Report Folders My Personal Reports Unfiled Account Reports KIVA Dashboard Reports DEMO DASHBOARDS Historical Projects Dan's Performance Log	

Expand All | Collapse All

Unfiled Account Reports (16) KIVA Dashboard Reports (15) DEMO DASHBOARDS (8) Historical Projects (3)

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

Reports

Filter

Folder: Dan's Performance Log Edit Add New Folder

Report: Clear

Add New Report Export Reports Import Reports Copy User Reports

Dan's Performance Log (1)

- *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.*

Edit Report Folder

Save Cancel Delete

*** Folder Name:** Dan's Performance Log

Reports in This Folder:

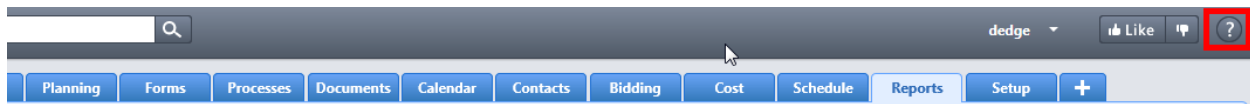
<p>Unfiled Reports</p> <ul style="list-style-type: none"> *Project List - All Projects CISI Document report without date CISI Folders with documents CISI Reports Public CISI's Created Last week Commercial Open Pre-Application Forms Documents Emailed into CR proj. Last 3 days Documents emailed into CRSF Folder Documents uploaded to SE folder without date LDD Open Pre-Application Forms Pre-Application report Residential Pre-Application open 	<div style="border: 1px solid red; padding: 2px; display: inline-block;"> ← </div> <div style="border: 1px solid red; padding: 2px; display: inline-block;"> → </div>	<p>Reports in This Folder</p> <ul style="list-style-type: none"> 5th floor intake Log
--	--	--

Save Cancel Delete

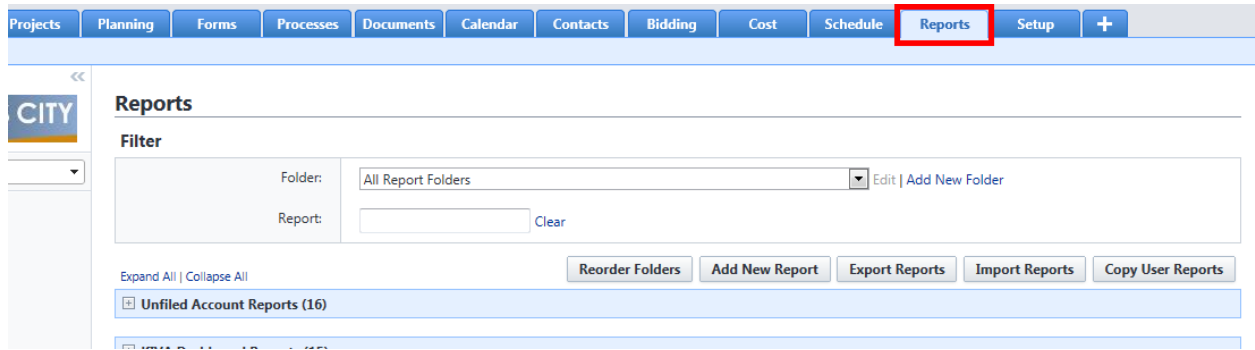
3. Click **Save**.

Creating a New Report

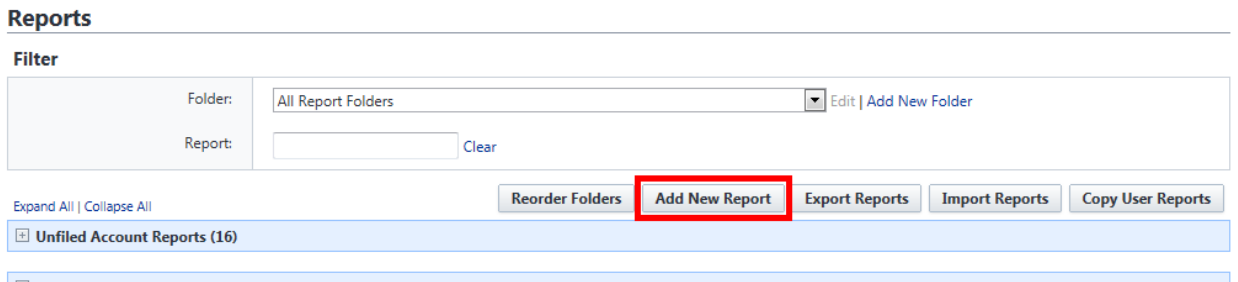
Users can create their own reports by using the Report Wizard, which is a series of screens that walks you through creating a customized report that displays only the information you need. As you complete each step, click **Next**. You can click the **Previous** button to go back to the previous step 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!)



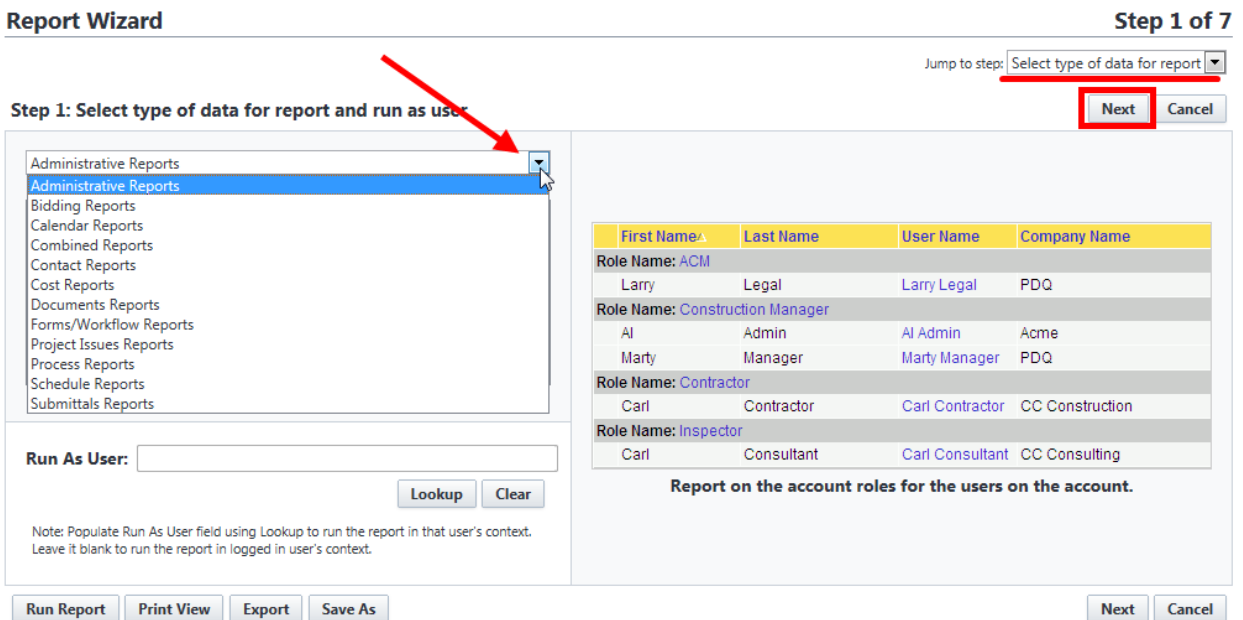
1. Click on the **Reports** tab at the top of the screen.



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**.

Report Wizard

Step 2 of 7

Jump to step: ▼

Previous **Next** Cancel

Step 2: Select type of report

Tabular Report

Tabular reports provide a simple listing of data, with no subtotals.

Summary Report

Summary reports provide the option to sort and subtotal the data.

Matrix Report

Matrix reports summarize data in a grid by grouping data in both rows and columns.

Run Report Print View Export Save As

Previous Next Cancel

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**.

Report Wizard

Step 3 of 7

Jump to step: ▼

Step 3: Select columns to include in your report Return row for each multivalued field value

Previous **Next** Cancel

Role Information Select All | Deselect All

Role Name Role Description

User Information Select All | Deselect All

<input type="checkbox"/> Account Expires	<input checked="" type="checkbox"/> Company Name	<input type="checkbox"/> Date added to role	<input type="checkbox"/> Email
<input type="checkbox"/> Email Format	<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Home Address	<input type="checkbox"/> Home City
<input type="checkbox"/> Home Country	<input type="checkbox"/> Home Fax	<input type="checkbox"/> Home Phone	<input type="checkbox"/> Home State
<input type="checkbox"/> Home Zip	<input type="checkbox"/> Job Title	<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> Office Address
<input type="checkbox"/> Office Cell	<input type="checkbox"/> Office City	<input type="checkbox"/> Office Country	<input type="checkbox"/> Office Fax
<input type="checkbox"/> Office Pager	<input type="checkbox"/> Office Phone	<input type="checkbox"/> Office PO Box	<input type="checkbox"/> Office State
<input type="checkbox"/> Office Zip	<input type="checkbox"/> Personal Cell	<input type="checkbox"/> Personal Pager	<input type="checkbox"/> Type of Business
<input type="checkbox"/> User Create Date	<input type="checkbox"/> User Department	<input type="checkbox"/> User Last Logon	<input checked="" type="checkbox"/> User Name

User Custom Fields Select All | Deselect All

Employee ID External User

Formula Columns Add New Formula Column

<input type="checkbox"/> Label	Formula
There are no formula columns.	

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

Jump to step: Select Aggregate Functions

Step 4: Select the information to summarize

Previous **Next** Cancel

Standard Summary Fields

Columns	Sum	Average	Largest Value	Smallest Value	% Total	Match
Record Count	<input checked="" type="checkbox"/>					
First Name						<input type="checkbox"/>
Last Name						<input type="checkbox"/>
User Name						<input type="checkbox"/>
Company Name						<input type="checkbox"/>

Run Report Print View Export Save As

Previous Next Cancel

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

Jump to step: Configure Columns

Step 5: Configure Columns

Previous **Next** Cancel

Column Order

- First Name
- Last Name
- User Name
- Company Name

Sort Order

First Name Ascending Descending

Ascending Descending

Ascending Descending

Set Column Widths

First Name	Last Name	User Name	Company Name

Set Column Highlights

Highlighting is only available when integer, decimal, or currency fields are selected.

Logo

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

Jump to step: Select Grouping

Step 6: Select columns to group your report by

Previous **Next** Cancel

Select Row Grouping:

Summarize Information By: Employee ID Sort Order: Ascending Group Dates by: Day

and then By: Sort Order: Ascending Group Dates by: Day

Run Report Print View Export Save As Previous Next Cancel

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

Standard Date Filter

Jump to step: Specify Filter

Columns: Account Expires

Duration: Custom

Dates: Start Date: End Date: Clear

Step 7: Specify filter criteria for this report

Previous Cancel

Show Report Details

Search Rule #1: Company Name equals e-Builder and

Search Rule #2: and

Search Rule #3: and

Search Rule #4: and

Search Rule #5:

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

Run Report Print View Export Save Save As Previous Cancel

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.

Projects Planning Forms Processes Documents Calendar Contacts Bidding Cost Schedule **Reports** Setup +

Reports

Filter

Folder: All Report Folders Edit Add New Folder

Report: Clear

Expand All | Collapse All

Reorder Folders Add New Report Export Reports Import Reports Copy User Reports

Unfiled Account Reports (16)

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

Reports

Filter

Folder: All Report Folders Edit | Add New Folder

Report: Clear

Export All | Collapse All Reorder Folders Add New Report Export Reports Import Reports Copy User Reports

Unfiled Account Reports (16)

- Edit | Delete | Export ***Project List - All Projects**
- Edit | Delete | Export **CISI Document report without date** - Run this to show all documents submitted in CISI folders then reduce by upload date.
- Edit | Delete | Export **CISI Folders with documents** - Run this to find all CISI with folders in ebuilder
- Edit | Delete | **Export** **CISI Reports Public** - Public report for CISI documents submitted
- Edit | Delete | Export **CISI's Created Last week** - Lists all PERM records with a CISI permit type created in last week.
- Edit | Delete | Export **Commercial Open Pre-Application Forms** - This shows open Pre-Application forms for Commercial
- Edit | Delete | Export **Documents Emailed into CR proj. Last 3 days** - Documents Emailed into CR proj. Last 3 days

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

Select Output Type

- Excel Data Export
- CSV Data Export
- Tab Delimited Text

Export Cancel

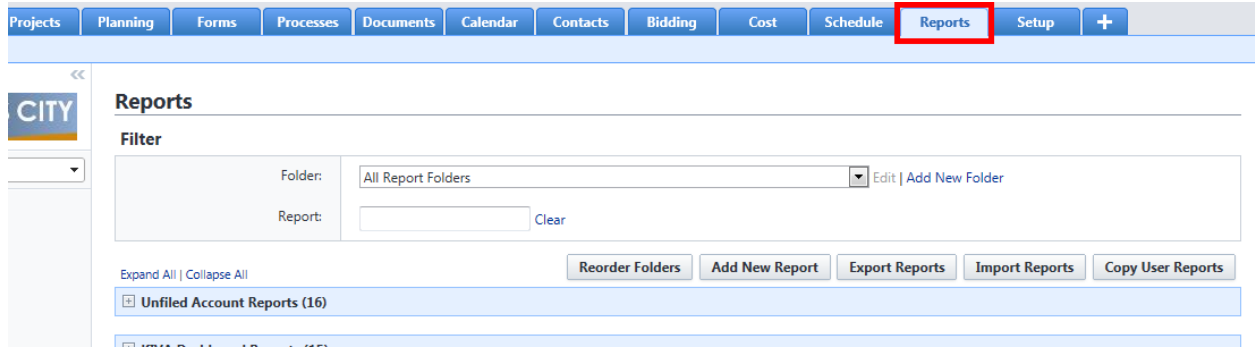
4. Select **Open** to view in Excel or **Save** to save the file onto your computer.

Do you want to open or save CISI Reports Public - 201307171605.xls (5.00 KB) from app.e-builder.net?

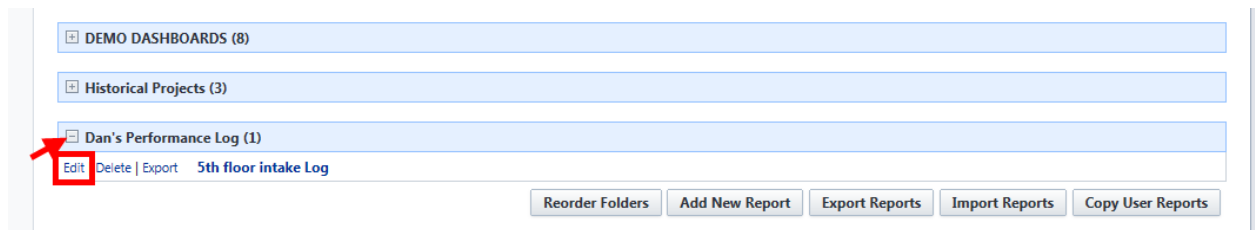
Open Save Cancel

Editing an Existing Report

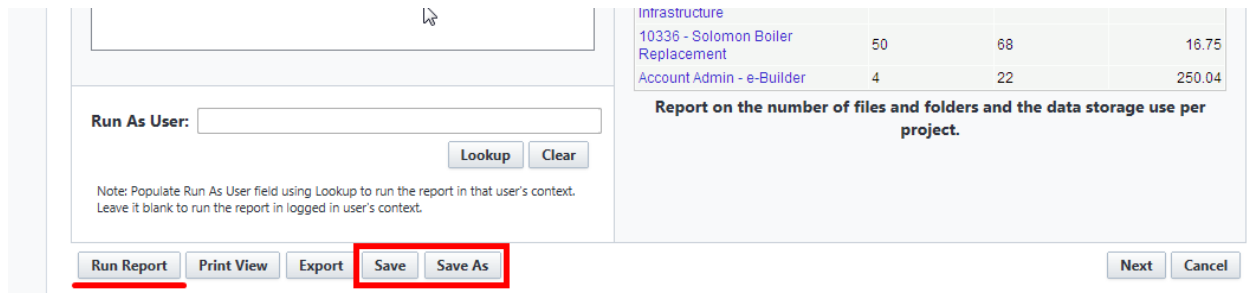
1. Click on the **Reports** tab at the top of the screen.



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

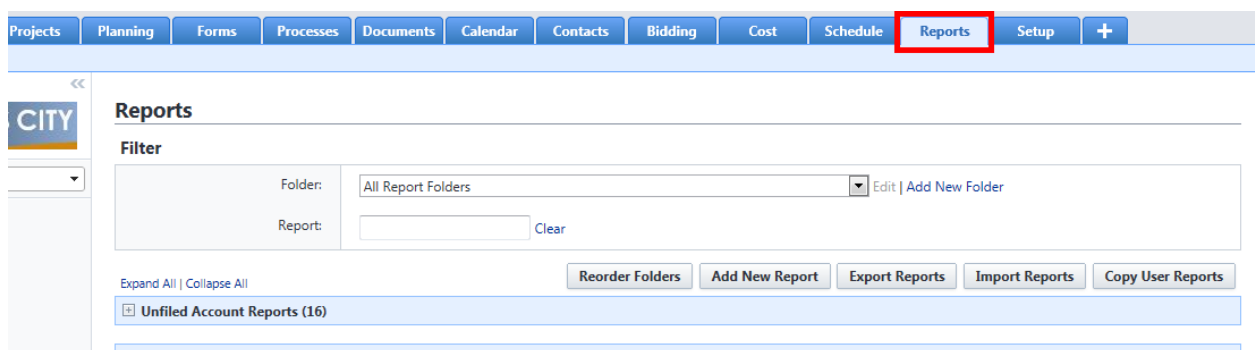


3. Modify any aspect of the report within the Report Wizard. (See *Creating a New Report*, above, for more information if necessary)
4. Click the **Save** or **Save As** (to rename) button .



Running Reports

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



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

Expand All | Collapse All

Reorder Folders Add New Report Export Reports Import Reports Copy User Reports

- [-] Unfiled Account Reports (16)
- [-] KIVA Dashboard Reports (15)
- [-] DEMO DASHBOARDS (8)
- [-] Historical Projects (3)
 - [-] Dan's Performance Log (1)
 - Edit | Delete | Export **5th floor intake Log**

Reorder Folders Add New Report Export Reports Import Reports Copy User Reports

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)						

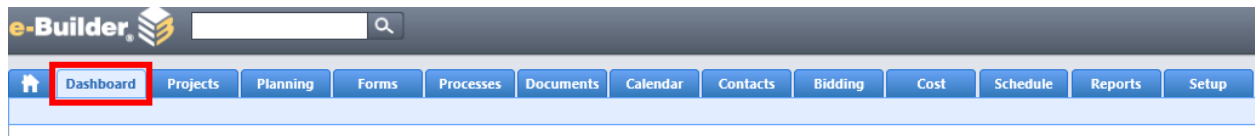
Hide Details Print View Send Export Edit Save Save As

Dashboard Module

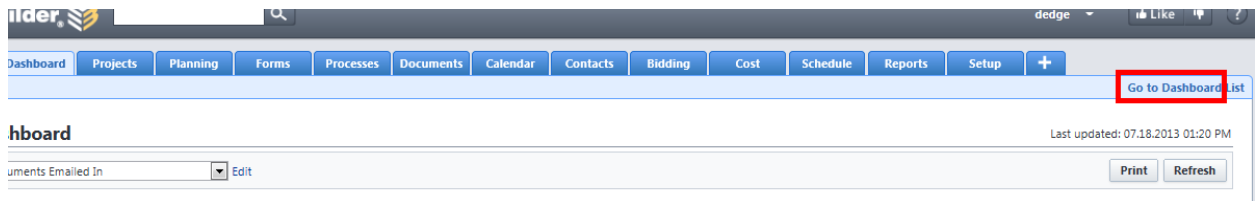
Dashboards are graphical representation of reports that present summary data in a visual format. They are typically used to provide overviews of program or project status and metrics. Dashboards are dependent on the information contained within the reports.

Creating a Dashboard

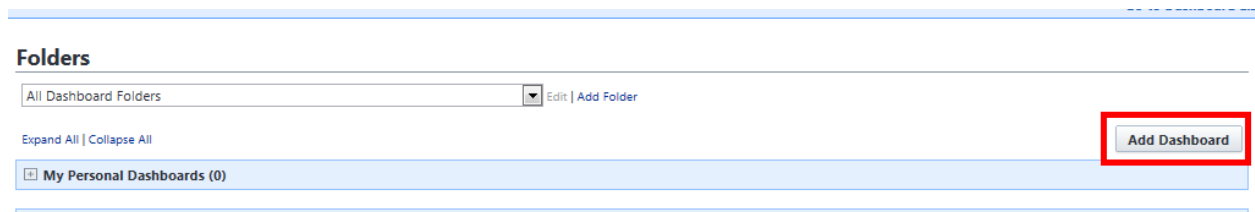
1. Click the **Dashboard** tab at the top of the page.



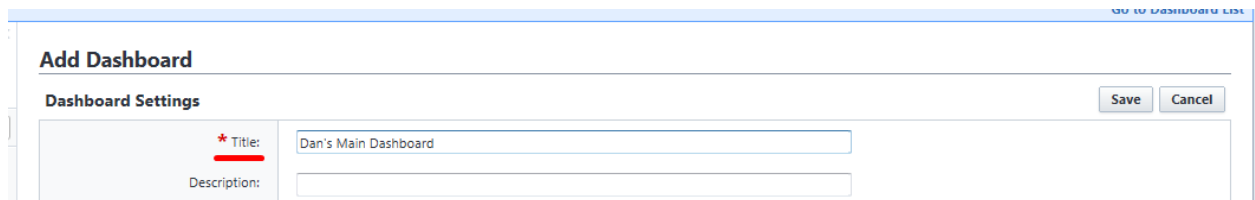
2. Select the **Go To Dashboard List** link, to the right of View Dashboard.



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**.

* Dashboard Layout Style: Two Columns Three Columns

* Size of Column 1: Medium

* Size of Column 2: Medium

* Size of Column 3: Narrow

6. Select the folder to store the dashboard in.

* Folder: My Personal Dashboards

7. Click the **Save** button.

Save Cancel

Dan's Main Dashboard

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.

Dashboard | Projects | Planning | Forms | Processes | Documents | Calendar | Contacts | Bidding | Cost | Schedule | Reports | +

Go to Dashboard List

e-Builder

Recent Pages...

Expand All | Collapse All

Add Dashboard

All Dashboard Folders

My Personal Dashboards (1)

Edit | Delete Dan's Main Dashboard

Unfiled Account Dashboards (1)

City Planning Department Dashboards (2)

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

Dashboard

Dan's Main Dashboard [Edit](#)

There are **0** dashboard items displayed on this dashboard
[Click Here to configure this dashboard](#)

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

Dan's Main Dashboard

[Add Dashboard Item](#) [Add Dashboard Item](#) [Add Dashboard Item](#)

e-Builder Community | About | Help

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

Dashboard Item Settings

Dashboard: Dan's Main Dashboard

* Component Type:

- Chart
- Table
- Metric
- Gauge

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

Header:

Footer:

Title:

* Custom Report:

* Select Project:

* Chart Type:

* Sort By:

* Select Aggregate(s):

All Aggregates

Selected Aggregates

Sum of Original Commitment Value

Sum of Amount

Sum of Current Commitment Value

Note: Selected aggregates must be the same function type. (e.g. only sums or only averages)

Y-Axis Label: Note: The Y Axis label is required only if multiple aggregates are selected
(30 chars max)

Maximum Items Displayed:

Save

Change Orders ▼ ⏪ Edit | Delete



9th Street Parking Garage

6. For Table

- Select Report and Sort By
- Click Save



Header:

Footer:

* Custom Report:

* Sort By:

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***

Header:

Footer:

* Custom Report:

* Sort By:

Maximum Items Displayed:

Low Range Color:

Low - Mid Cutoff Value:

Middle Range Color:

High Threshold Value:

High Range Color:

Total User Logins ⬆️ ⬅️ Edit | Delete

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	5.00
Dwyer	2.00
Nanninga	2.00
Fecteau	1.00
Godsey	1.00
Matovu	1.00
Admin	0.00

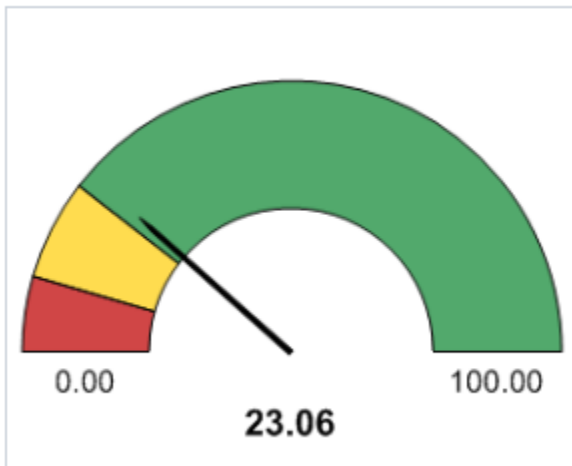
Last 30 Days

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

Footer:	<input type="text" value="Last 30 Days"/>
Title:	<input type="text"/>
* Custom Report:	<input type="text" value="Dashboards - Avg User Logins"/>
Minimum Value:	<input type="text"/>
Maximum Value:	<input type="text" value="100"/>
Low Range Color:	<input type="color" value="#C00000"/>
Low - Mid Cutoff Value:	<input type="text" value="9"/>
Middle Range Color:	<input type="color" value="#FFD700"/>
High Threshold Value:	<input type="text" value="21"/>
High Range Color:	<input type="color" value="#008000"/>



Average User Logins [dropdown] [left arrow] [right arrow] Edit | Delete

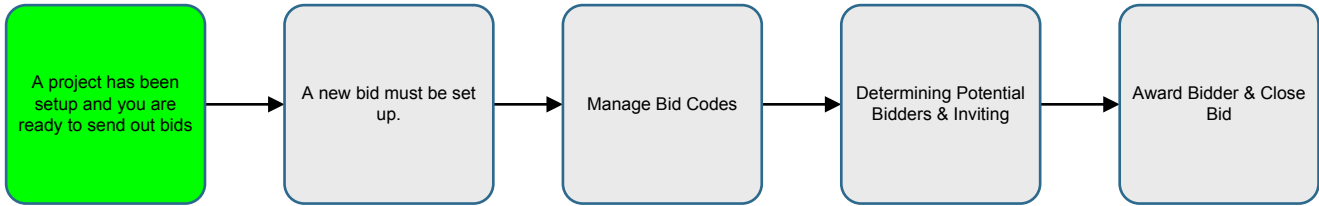


Last 30 Days

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

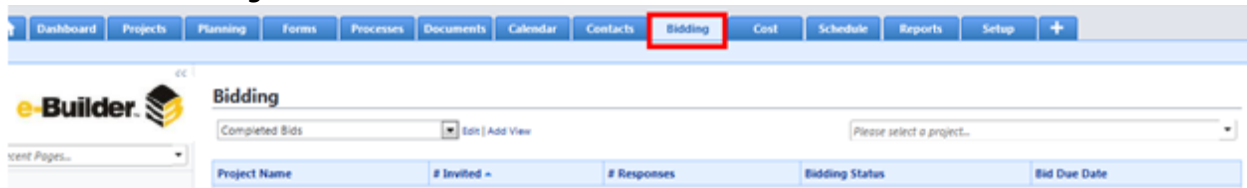
Bidding Module

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.

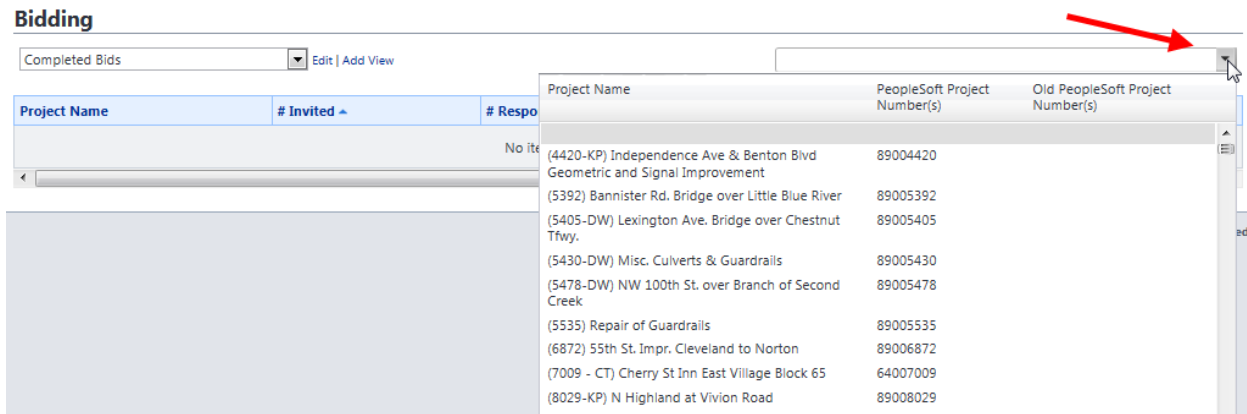


Inviting Bidders/Closing a Bid

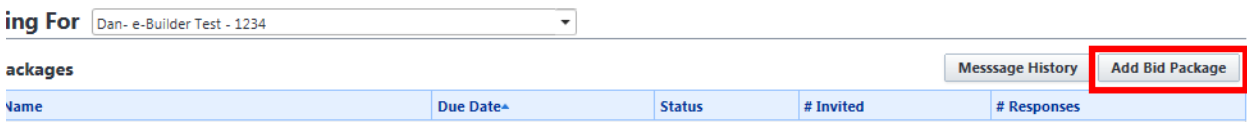
1. Go to the **Bidding** tab.



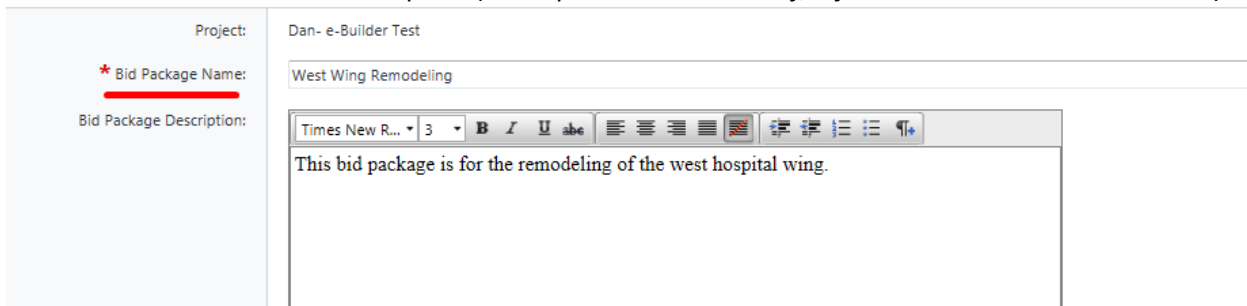
2. Select the project you are sending the bid out for.



3. Click **Add Bid Package**.



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



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

Pre-Bid Meeting Date/Time: 5 : 00 PM

Pre-Bid Meeting Location:

Required to Attend Pre-Bid Meeting?: (Only applicable if pre-bid meeting details are provided above)

* Bidding Contact: Dan Edge

* Bid Start Date/Time: 07.02.2013 5 : 00 PM

* Bid Due Date/Time: 07.19.2013 2 : 00 PM

* Bid Time Zone: (GMT-05:00) Eastern Time (US & Canada)

Tentative Award Date:

- Select the bid documents folder. (The folder to house bid package documentation)
- Select the bid response folder. (The folder to house bid package responses)

Tentative Work Finish Date:

Allow Bids After Due Date? 5 : 00 PM

Bid Instructions Document: [Select file]

* Bid Documents Folder: [Select folder]

* Bid Response Supporting Documentation Folder: [Select folder]

- Click **Save**.

There are no bid custom fields.

Save Cancel

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

Bid Package Details

Bidding Details Potential Bidders Invited Bidders Bid Documents Questions/Responses

Manage Codes Close Edit Send Message Message History

Project: Dan- e-Builder Test

Bid Package: West Wing Remodeling

Bid Package Description: This bid package is for the remodeling of the west hospital wing.

- 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.

Bid Package Details

Bidding Details | Bid Scope | **Potential Bidders** | Invited Bidders | Bid Documents | Questions/Responses | Bid Tabulation

Manage Codes | Close | Edit | Send Message | Message History

Project: Kai Training Center
 Project Number: UH234215
 Bid Package: Dan's Bid Package
 Status: Open

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

Bid Package Details

Bidding Details | Bid Scope | **Potential Bidders** | Invited Bidders | Bid Documents | Questions/Responses | Bid Tabulation

Manage Codes | Close | Send Message | Message History

Project: Kai Training Center
 Project Number: UH234215
 Bid Package: Dan's Bid Package
 Status: Open

Show Notes | Print | Invite | **Add From Project** | **Add** | Delete

<input type="checkbox"/>	Company	Contact	Email	Fax	Phone	Date Created
There are no potential bidders for this project.						

Print | Invite | Add From Project | Add | Delete

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

Bid Package Details

Bidding Details | Bid Scope | **Potential Bidders** | Invited Bidders | Bid Documents | Questions/Responses | Bid Tabulation

Close | Send Message | Message History

Project: Kai Training Center
 Project Number: UH234215
 Bid Package: Dan's Bid Package
 Status: Open

Show Notes | Print | **Invite** | Add From Project | Add | Delete

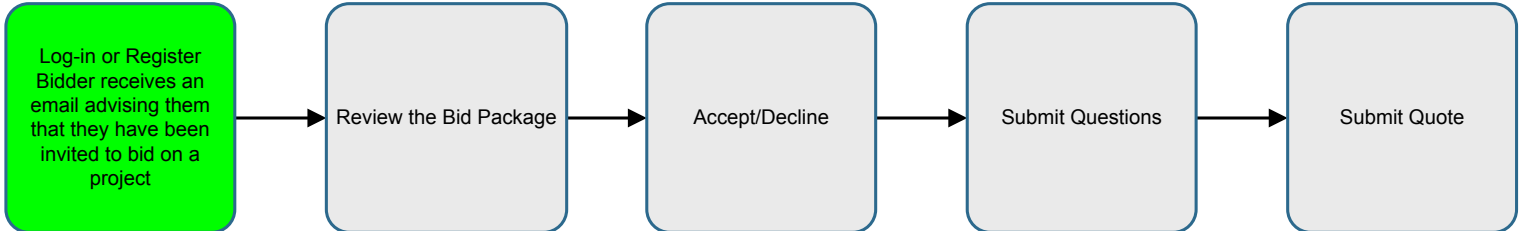
<input type="checkbox"/>	Company	Contact	Email	Fax	Phone	Date Created
<input checked="" type="checkbox"/>	Brockamp & Jaeger	John Brockamp	cotero@e-builder.net			07.18.2013 3:07 PM
<input type="checkbox"/>	Payne Construction	Thomas Payne	cotero@e-builder.net			07.18.2013 3:07 PM
<input checked="" type="checkbox"/>	PDG Construction	Emily Pdg	cotero@e-builder.net			07.18.2013 3:07 PM
<input type="checkbox"/>	Todd Hess Construction	Todd Hess	cotero@e-builder.net			07.18.2013 3:07 PM

Print | Invite | Add From Project | Add | Delete

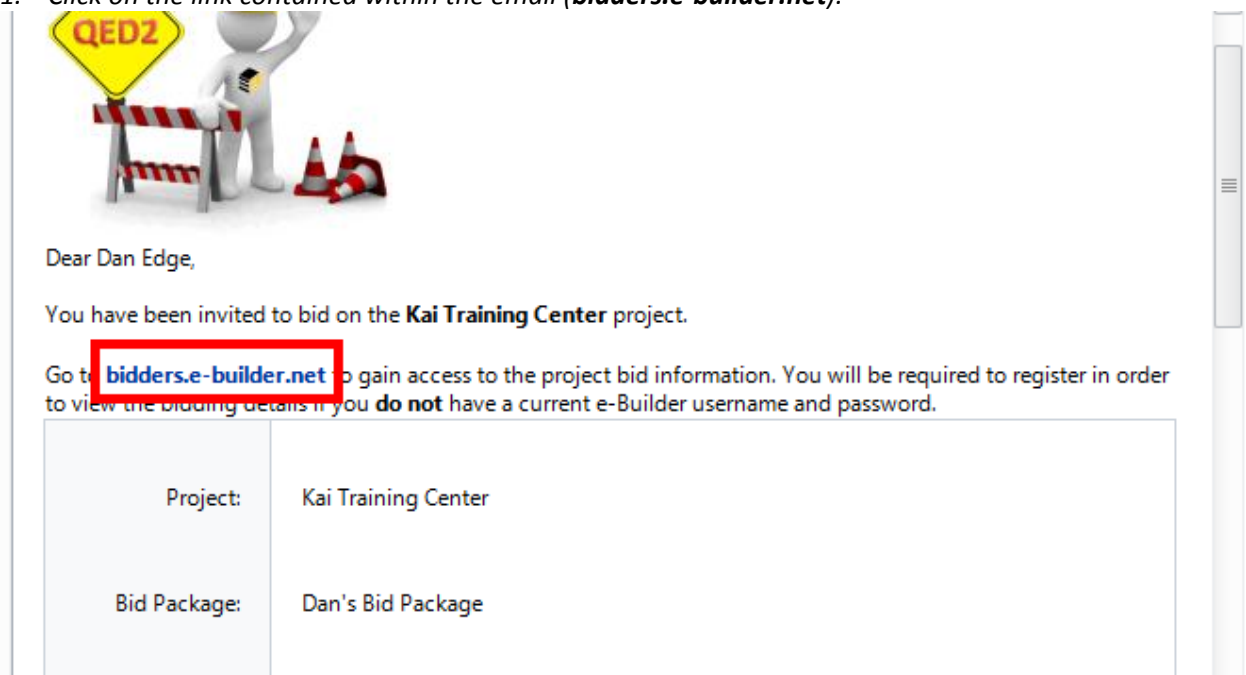
14. Add a subject and message if needed. Press **Send**.


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**).





Dear Dan Edge,

You have been invited to bid on the **Kai Training Center** project.

Go to **bidders.e-builder.net** to gain access to the project bid information. You will be required to register in order to view the bidding details if you **do not** have a current e-Builder username and password.

Project:	Kai Training Center
Bid Package:	Dan's Bid Package

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.

Invitation to Bid

Bidding Status
 Bidding time remaining: 11 Days 0 Hours 50 Minutes

Bidding Information

[Go To List of All Bids](#)

[Generate Fax Coversheet](#)
[Accept / Decline](#)
[Submit Quote](#)

Project: Kai Training Center Pre-Bid Meeting Date/Time: Bid Package Status: Open Bid Start Date/Time: 07.18.2013 4:00 PM Bid Due Date/Time: 07.29.2013 5:00 PM Bid Time Zone: (GMT-05:00) Eastern Time (US & Canada)	Bid Package: Dan's Bid Package Pre-Bid Meeting Location: Bid Contact: QED2 Bid Submitted: No Bidding Status: Pending
---	--

Bid Documents
Questions/Responses

To view a document, click the file name.
 To download files, select the associated checkbox(es) and click the Download button to the right.

Expand All | Collapse All Total size of selected documents - 1.6MB (Max 100MB)

Download

- Bid Responses
- e-Builder Office Renovation
 - East Tower
 - Ace-Air Incorporated_Bidder_Bob
- FF&E Bid Package- Bookcase
 - Grout Chimney Stabilization
 - HCA Example
- Hotel Addition
 - OR Addition
- Paving - Driveway and Cart Path
- ResponseFrom_A & M Specialties, Inc_0423201354157.xls

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

Bidding Status
 Bidding time remaining: 11 Days 0 Hours 49 Minutes

Bidding Information

[Go To List of All Bids](#)

[Generate Fax Coversheet](#)
Accept / Decline
[Submit Quote](#)

Project: Kai Training Center Pre-Bid Meeting Date/Time: Bid Package Status: Open	Bid Package: Dan's Bid Package Pre-Bid Meeting Location: Bid Contact: QED2
--	--

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

Update Bidding Status

Bidding Information

[Save](#)
Cancel

Project: Kai Training Center Bid Package: Dan's Bid Package	Owner: QED2 Bid Due Date: 07.29.2013 5:00 PM
--	---

Message Information

To: James Hendrix

Subject: Invitation to bid response - Dan Edge - Kai Training Center

* **Bidding Status:** Pending Will bid Will not bid

Enter a message if desired

Message:



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

Invitation to Bid

Bidding Status
Bidding time remaining: 11 Days 0 Hours 47 Minutes

Bidding Information [Go To List of All Bids](#) [Generate Fax Coversheet](#) [Accept / Decline](#) [Submit Quote](#)

Project:	Kai Training Center	Bid Package:	Dan's Bid Package
Pre-Bid Meeting Date/Time:		Pre-Bid Meeting Location:	
Bid Package Status:	Open	Bid Contact:	QED2
Bid Start Date/Time:	07.18.2013 4:00 PM	Bid Submitted:	No
Bid Due Date/Time:	07.29.2013 5:00 PM	Bidding Status:	Will Bid
Bid Time Zone:	(GMT-05:00) Eastern Time (US & Canada)		

Bid Documents **Questions/Responses**

Expand All | Collapse All [Submit Question](#)

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

Bidder Question

* **Subject**

* **Question**

[Save](#) [Clear](#) [Cancel](#)

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

Invitation to Bid

Bidding Status
Bidding time remaining: 11 Days 0 Hours 45 Minutes

Bidding Information [Go To List of All Bids](#) [Generate Fax Coversheet](#) [Accept / Decline](#) [Submit Quote](#)

Project:	Kai Training Center	Bid Package:	Dan's Bid Package
Pre-Bid Meeting Date/Time:		Pre-Bid Meeting Location:	

- Upload your bid submission by clicking the **Browse** button.

- 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.

Invitation To Bid Response

Bidding Information [Upload File](#) [Cancel](#)

Project:	Kai Training Center	Owner:	QED2
Bid Package:	Dan's Bid Package	Bid Due Date:	07.29.2013 5:00 PM

Upload Bid Submission

Select the file to submit: C:\Users\dedge\Documents\Guides\MASTER User Training G [Browse...](#) [Upload File](#) [Cancel](#)

- Click **Upload File**. The file will automatically be sent to a Response file within e-Builder.

- A message stating that "Your quote has been received" will be displayed. Click **Continue**.

Invitation To Bid Response

Your quote has been received.

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**.

Bid Package Details

Bidding Details Bid Scope Potential Bidders **Invited Bidders** Bid Documents Questions/Responses Bid Tabulation

Close Send Message Message History

Project: Kai Training Center Project Number: UH234215
 Bid Package: Dan's Bid Package Status: Open

Show Notes Reinvite Print Invite

	Company	Contact	Email	Fax	Phone	Bid Submitted	Status
<input type="checkbox"/>	Brockamp & Jaeger	John Brockamp	cotero@e-builder.net			No	Pending
<input checked="" type="checkbox"/>	e-builder	Dan Edge	dedge@e-builder.net			Yes	Will bid
<input type="checkbox"/>	PDG Construction	Emily Pdg	cotero@e-builder.net			No	Pending

Reinvite Print Invite

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

Show Notes Reinvite Print Invite

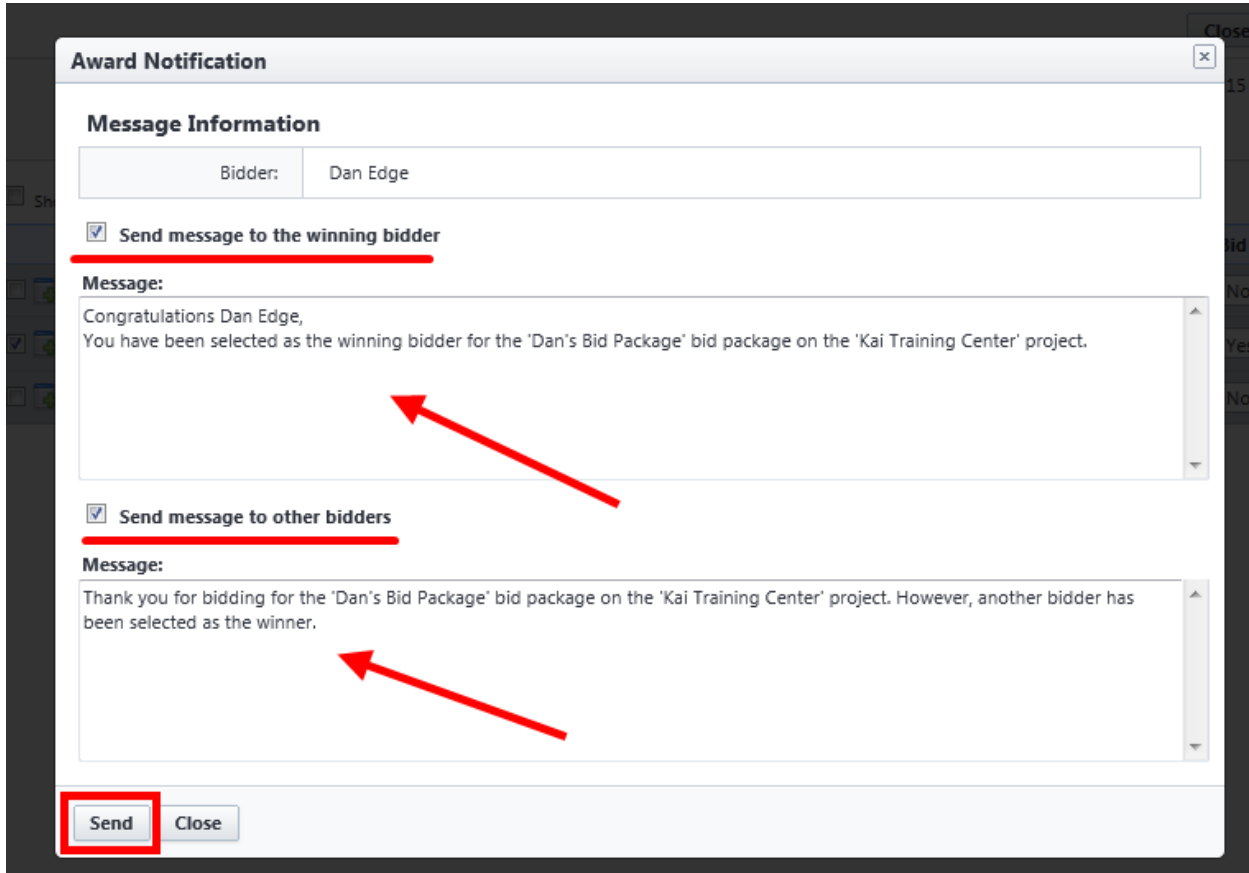
	Company	Contact	Email	Fax	Phone	Bid Submitted	Status
<input type="checkbox"/>	Brockamp & Jaeger	John Brockamp	cotero@e-builder.net			No	Pending
<input checked="" type="checkbox"/>	e-builder	Dan Edge	dedge@e-builder.net			Yes	Will bid
<input type="checkbox"/>	PDG Construction	Emily Pdg	cotero@e-builder.net			No	Pending

Bidder Options

Re-Invite
 Revoke
 Award
 Delete

Close

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



Award Notification

Message Information

Bidder: Dan Edge

Send message to the winning bidder

Message:
Congratulations Dan Edge,
You have been selected as the winning bidder for the 'Dan's Bid Package' bid package on the 'Kai Training Center' project.

Send message to other bidders

Message:
Thank you for bidding for the 'Dan's Bid Package' bid package on the 'Kai Training Center' project. However, another bidder has been selected as the winner.

Send Close

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.

Project Name	PeopleSoft Project Number(s)	Old PeopleSoft Project Number(s)
(4420-KF) Independence Ave & Benton Blvd Geometric and Signal Improvement	89004420	
(5392) Bannister Rd. Bridge over Little Blue River	89005392	
(5405-DW) Lexington Ave. Bridge over Chestnut Tways.	89005405	
(5430-DW) Misc. Culverts & Guardrails	89005430	
(5478-DW) NW 100th St. over Branch of Second	89005478	

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

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

Submittal Register for Kai Training Center

Filter Submittal Items

All Pending my review

Open Closed Draft O

Title:

Status:

Number:

Revision:

Submittal Package #: -

Rev:

Responsible Sub/Manufacturer:

Custom Field 1:

Description:

Category:

Priority:

Spec Section:

Sub Section:

Custom Field 2:

Group By: Page of Show per page

<input type="checkbox"/>	Item Details	Title	# ▲	Rev #	Package #	Spec Section	Sub Section	Category	Status
There are no submittal items pending for review									

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:

Submittal Item Built-In Fields

Previous Next Cancel

* Title:	<input type="text"/>	* Category:	<input type="text"/>
Description:	<input type="text"/>	Priority:	<input type="text"/>
Responsible Manufacturer/Sub-Contractor:	<input type="text"/>	Commitment:	<input type="text"/>
Spec Section:	<input type="text"/>	Sub Section:	<input type="text"/>
Date Due From Sub:	<input type="text"/>	Date Received From Sub:	<input type="text"/>
Date Due Submit For Review:	<input type="text"/>	Date Due Review Complete:	<input type="text"/>
Date Due Return:	<input type="text"/>	Date Returned:	<input type="text"/>
Date Due Delivery:	<input type="text"/>	Date Delivered:	<input type="text"/>

From the Submittal Register page:

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

Group By: Page of Show per page

Add To Package Add Item Delete **Import**

<input type="checkbox"/>	Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Held By
There are no submittal items.										

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

Import Submittal Register for Kai Training Center - Select Import File

Step 1 of 3

Choose your Import File

* Import File:

Note: Please select a .xls or .xlsx file to import.

Next

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**.

Import Submittal Register for Kai Training Center - Field Mappings

Step 2 of 3

Submittal Item Built-In Fields Previous **Next** Cancel

* Title:	<input type="text"/>	* Category:	Category
Description:	<input type="text"/>	Priority:	<input type="text"/>
Responsible Manufacturer/Sub-Contractor:	<input type="text"/>	Commitment:	<input type="text"/>
Spec Section:	<input type="text"/>	Sub Section:	<input type="text"/>
Date Due From Sub:	<input type="text"/>	Date Received From Sub:	<input type="text"/>
Date Due Submit For Review:	<input type="text"/>	Date Due Review Complete:	<input type="text"/>
Date Due Return:	<input type="text"/>	Date Returned:	<input type="text"/>
Date Due Delivery:	<input type="text"/>	Date Delivered:	<input type="text"/>

Custom Fields

RAM Number:	<input type="text"/>
Bid Item:	<input type="text"/>

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**.

Import Submittal Register for Kai Training Center - Review

Step 3 of 3

Import File Summary Previous **Import** Cancel

File Name:	SubmittalTest.xlsx	Rows In File:	24
Rows To Be Imported:	4	Rows With Exceptions:	20

Preview (Row 2) | Exceptions (20)

Submittal Item Built-In Fields

Title:	Concrete Admixture(s) Design	Category:	Sample
Description:		Commitment:	
Priority:	Normal	Sub Section:	
Spec Section:		Date Received From Sub:	
Responsible Sub/Manufacturer:		Date Due Review Complete:	
Date Due From Sub:		Date Returned:	
Date Due Submit For Review:		Date Delivered:	
Date Due Return:			
Date Due Delivery:			

Submittal Item Custom Fields

RAM Number:	<input type="text"/>
-------------	----------------------

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.

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Held By
There are no submittal items.									

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)

Add Submittal Item

Details

Project Name: Kai Training Center

* Title:

Description:

Number:

Submittal Package:

Spec Section:

* Category: Please Select..

Responsible Sub/Manufacturer:

Project Number: UH234215

Status: NEW

Submittal Item Status:

Priority: Please Select..

Revision:

Sub Section:

Commitment: Select a commitment...

Date Details

Target	Actual
Date Due From Subcontractor: <input type="text"/>	Date Received From Subcontractor: <input type="text"/>
Submit For Review Due Date: <input type="text"/>	Date Submitted For Review: <input type="text"/>
Review Complete Due Date: <input type="text"/>	Date Review Completed: <input type="text"/>
Consultant Respond By Date: <input type="text"/>	Consultant Review Complete Date: <input type="text"/>
Return Due Date: <input type="text"/>	Date Returned: <input type="text"/>
Delivery Due Date: <input type="text"/>	Date Delivered: <input type="text"/>

Custom Fields

RAM Number:

Bid Item:

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

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Held By
<input type="checkbox"/>	Fire Protection System	1	0		15300	a	Product Data	NEW	
<input type="checkbox"/>	Fire Protection System	2	0		15300	b	Shop Drawing	NEW	
<input type="checkbox"/>	Fire Protection System	3	0		15300	c	Shop Drawing	NEW	
<input type="checkbox"/>	Fire Protection System	4	0		15300	d	Shop Drawing	NEW	
<input type="checkbox"/>	Fire Protection System	5	0		15300	e	Product Data	NEW	

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.

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Held By
<input checked="" type="checkbox"/>	Fire Protection System	1	0		15300	a	Product Data	NEW	
<input type="checkbox"/>	Fire Protection System	2	0		15300	b	Shop Drawing	NEW	
<input checked="" type="checkbox"/>	Fire Protection System	3	0		15300	c	Shop Drawing	NEW	
<input checked="" type="checkbox"/>	Fire Protection System	4	0		15300	d	Shop Drawing	NEW	
<input type="checkbox"/>	Fire Protection System	5	0		15300	e	Product Data	NEW	
<input type="checkbox"/>	Fire Protection System	6	0		15300	f	Product Data	NEW	

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**.

Send Items to Sub

Send to Sub Cancel

Project: Dedge Hammer

Project Number:

* **Forward To:**

Send Type:

* **Respond By:**

CC:

CC External Users Via Email:

** Select folder for external user to attach files:

Message:

Project: Dedge Hammer

Project Number:

--Select a Role (Optional)--

There are no users in this role / project

OR Enter external user (email)

Lookup

Action Required ?

Notify Only ?

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]

Message:

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

Submittal Item Details

Submittal Item Overview
Date Details

Reply

Project:	Dedge Hammer	Project Number:	
Title:	Fire Protection System	Status:	NEW
Number:	1	Submittal Item Status:	Draft
Description:	Manufacturers Data	Priority:	Normal
Submittal Package #:		Revision:	0
Spec Section:	15300	Sub Section:	a
Category:	Product Data	Commitment:	
Responsible Sub/Manufacturer:			

Documents (0)
Comments (0)
Custom Fields (8)
Revisions (0)

Attach New Documents

	Attached By	Attached To
There are no documents attached to this submittal item.		

Attach New Documents

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:

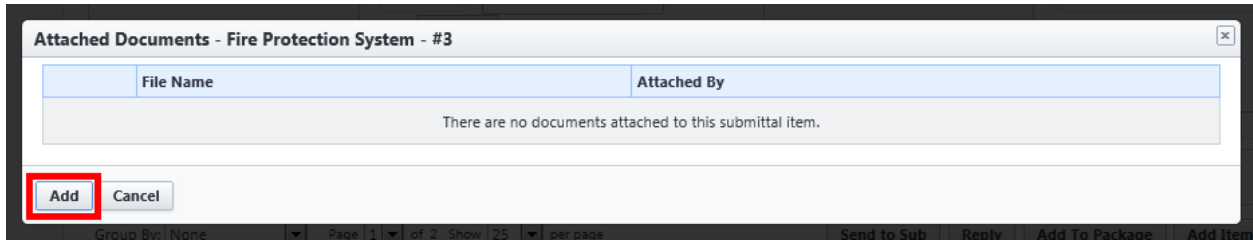
11. Select the **paperclip** icon next to the appropriate item.

Group By: None
Page 1 of 2 Show 25 per page

Send to Sub
Reply
Add To Package
Add Item
Delete
Import

	Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Held By
<input type="checkbox"/>		Fire Protection System	1	0		15300	a	Product Data	NEW	Dan Edge
<input type="checkbox"/>		Fire Protection System	2	0		15300	b	Shop Drawing	NEW	
<input type="checkbox"/>		Fire Protection System	3	0		15300	c	Shop Drawing	NEW	dedge@e-builder.net
<input type="checkbox"/>		Fire Protection System	4	0		15300	d	Shop Drawing	NEW	dedge@e-builder.net
<input type="checkbox"/>		Fire Protection System	5	0		15300	e	Product Data	NEW	

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.

Clear Filter

Group By: None Page 1 of 2 Show 25 per page

Send to Sub Reply **Add To Package** Add Item Delete Import

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Held By
<input checked="" type="checkbox"/>	Fire Protection System	1	0		15300	a	Product Data	NEW	Dan Edge
<input checked="" type="checkbox"/>	Fire Protection System	2	0		15300	b	Shop Drawing	NEW	
<input checked="" type="checkbox"/>	Fire Protection System	3	0		15300	c	Shop Drawing	NEW	dedge@e-builder.net
<input checked="" type="checkbox"/>	Fire Protection System	4	0		15300	d	Shop Drawing	NEW	dedge@e-builder.net
<input checked="" type="checkbox"/>	Fire Protection System	5	0		15300	e	Product Data	NEW	
<input checked="" type="checkbox"/>	Fire Protection System	6	0		15300	f	Product Data	NEW	
<input type="checkbox"/>	Fire Hose System	7	0		15301	a	Product Data	NEW	

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

✕

Add to Package

Create new submittal package
 Select existing submittal package

Please select a package... ▾

17. Enter the following information

- Submittal Package Name
- Description
- Submittal Package #
- Trade

18. Click **Save**.

Add Submittal Package

Details

Project: Dedge Hammer

Project Number:

* Submittal Package Name:

Description:

Submittal Package #: 2 - - 0

Trade:

Custom Fields

Related SOV Item:

Page 1 of 1 Show 25 per page

Title	#	Rev #	Spec Section	Sub Section	Category	Status
<input checked="" type="checkbox"/> Fire Protection System	1		15300	a	Product Data	NEW
<input checked="" type="checkbox"/> Fire Protection System	2		15300	b	Shop Drawing	NEW

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**.

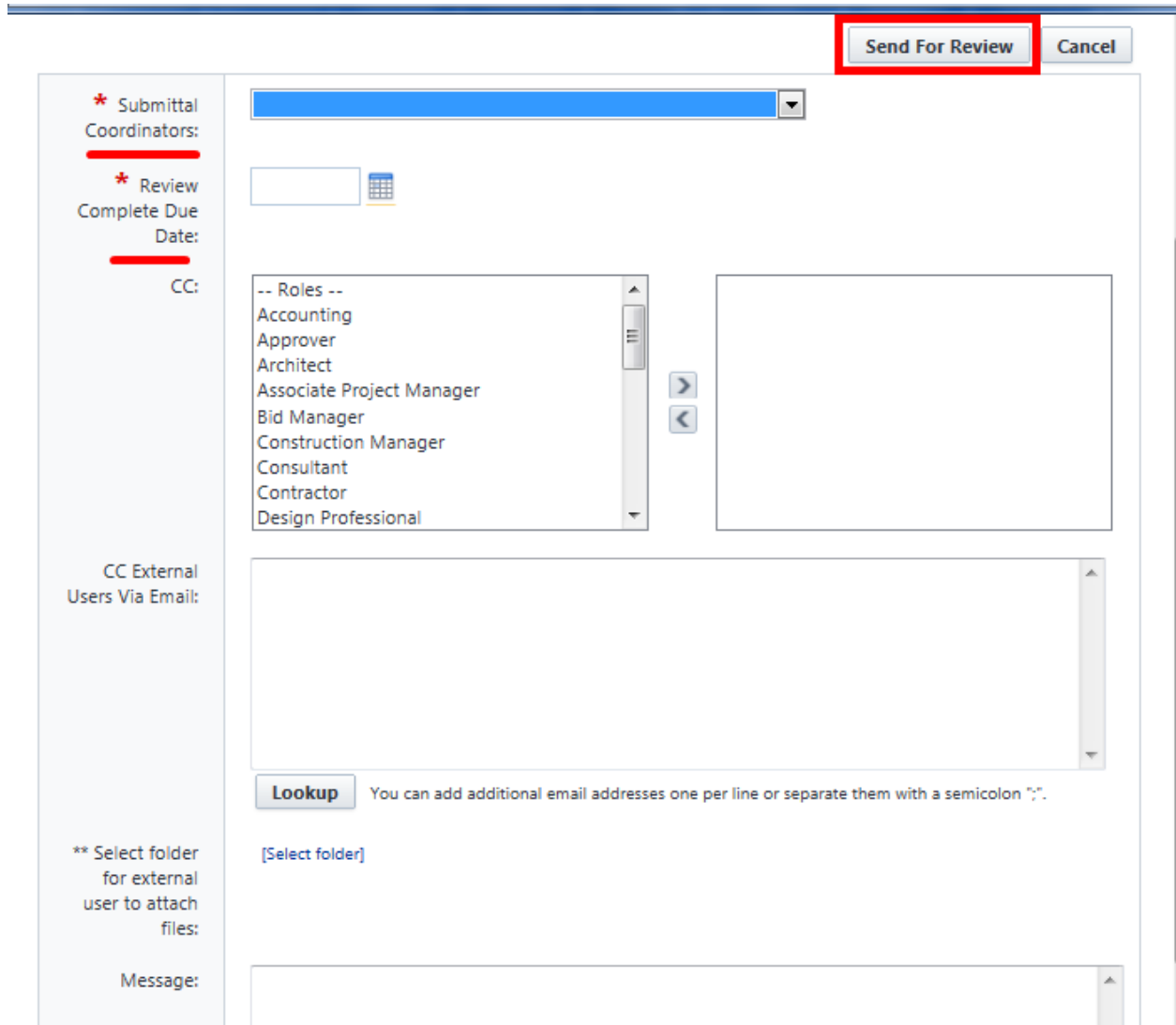
> Issues
 > Processes
 > Documents
 > Schedule
 > Cost
 > Contacts
 > Calendar
 > Bidding
 > Submittals
 Submittal Register
 Submittal Packages
 Update Dates
 Settings

Layout: Layout Page 1 of 1 Show 10 per page

 Create Package **Send for Review**

Title	Description	Package #	Revision Number	Trade	Status	Date Created	Created By	Date Closed
<input type="checkbox"/> Main Fire Extinguisher System		1-0	0		Draft	07.19.2013	Dan Edge	
<input type="checkbox"/> Main Fire Protection System		2-0	0		Draft	07.19.2013	Dan Edge	

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**.*



Send For Review Cancel

* Submittal Coordinators: [Dropdown]

* Review Complete Due Date: [Date Picker]

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]

** Select folder for external user to attach files:

Message: [Text Area]

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

FORMS | Processes

My first 10 tasks Show First ten

Project	Task	Finish Date	%	Manager
There are no tasks				

Tasks

Submittal items in your court Show First ten

Project	Title	#	Rev #	Package #	Status	Due Date
Dedge Hammer	Fire Extinguisher System	13	0	1-0	NEW	
Dedge Hammer	Fire Extinguisher System	14	0	1-0	NEW	
Dedge Hammer	Fire Extinguisher System	15	0	1-0	NEW	
Dedge Hammer	Fire Protection System	1	0	2-0	NEW	
Dedge Hammer	Fire Extinguisher System	12	0	1-0	NEW	

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.

Submittal Package Details

Submittal Package Overview History

Request Comment Send To Contractor Generate Transmittal

Project:	Dedge Hammer	Project Number:	
Title:	<u>Main Fire Extinguisher System</u>	Status:	Open
Description:		Trade:	
Submittal Package #:	1-0	Created By:	Dan Edge
Date Created:	07.19.2013 9:37 AM	Submitted For Review By:	Dan Edge
Date Submitted For Review:	07.19.2013	Baseline Finish Range:	07.22.2013 - 07.22.2013
Submittal Coordinator:	Dan Edge (e-Builder, Inc.)		
Baseline Start Range:	07.22.2013 - 07.22.2013		

Items (4) Documents (0) Comments (0) Custom Fields (1) Revisions (0)

Group By: None Page 1 of 1 Show 25 per page Forward

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Held By
<input checked="" type="checkbox"/>	Fire Extinguisher System	12	0	15302	a	Product Data	NEW	Dan Edge
<input checked="" type="checkbox"/>	Fire Extinguisher System	13	0	15302	b	Shop Drawing	NEW	Dan Edge
<input type="checkbox"/>	Fire Extinguisher System	14	0	15302	c	Product Data	NEW	Dan Edge

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**.

Forward Submittal Items

Forward Cancel

Project: Dedge Hammer

Project Number:

* Forward To: --Select a Role (Optional)--
 There are no users in this role / project
 OR Enter external user (email) Lookup

Send Type:
 Action Required ?
 Notify Only ?

* Respond By: Calendar

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]

Message:

Updating the Status

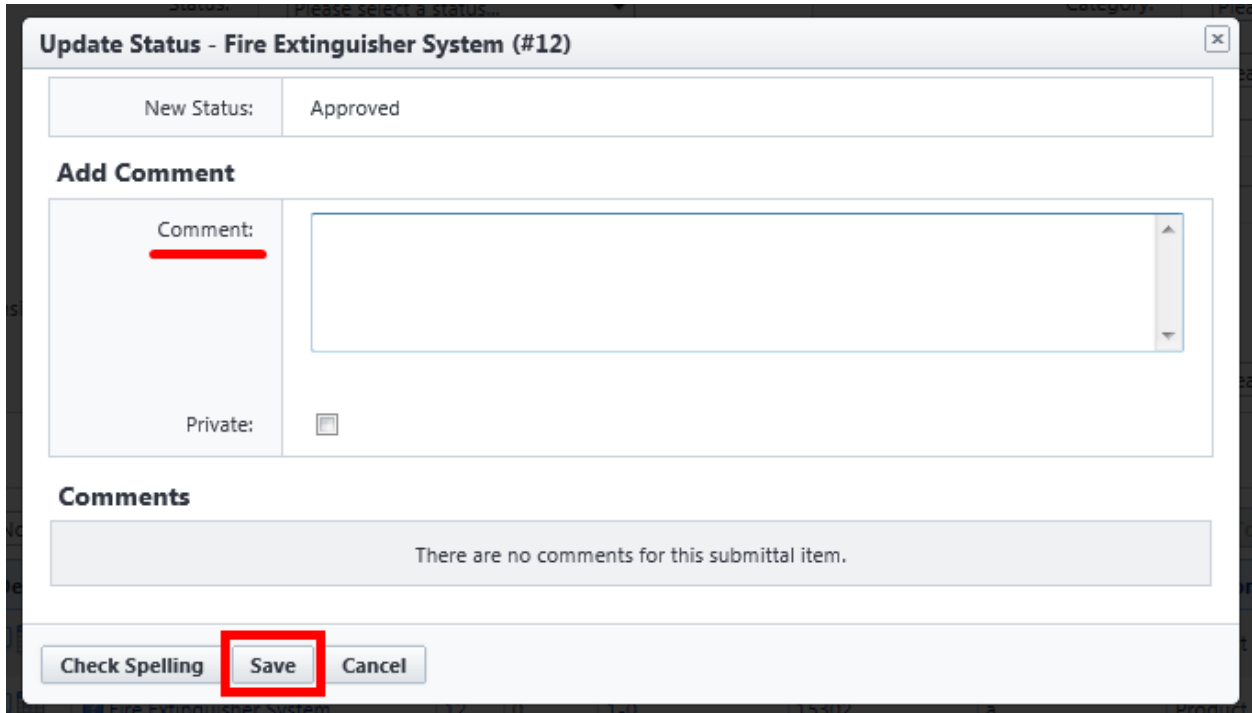
Once the submittal item has been reviewed, the Architect should update the status of the item.

From the Submittal Details screen:

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

<input type="checkbox"/>					Fire Extinguisher System	12	0	1-0	15302	a	Product Data	NEW	Dan Edge
<input type="checkbox"/>					Fire Extinguisher System	13	0	1-0	15302			NEW	Dan Edge
<input type="checkbox"/>					Fire Extinguisher System	14	0	1-0	15302			APP Approved	Dan Edge
<input type="checkbox"/>					Fire Extinguisher System	15	0	1-0	15302			AAN Approved As Noted	Dan Edge
												FRO For Record Only	Dan Edge
												ONH On Hold	Dan Edge
												REJ Rejected	
												RAR Revise & Resubmit	

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



Update Status - Fire Extinguisher System (#12)

New Status: Approved

Add Comment

Comment:

Private:

Comments

There are no comments for this submittal item.

Check Spelling Save Cancel

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.

Submittal Package Details

Submittal Package Overview **History**

Request Comment **Send To Contractor** Generate Transmittal

Project:	Dedge Hammer	Project Number:	
Title:	Main Fire Extinguisher System	Status:	Approved
Description:		Trade:	
Submittal Package #:	1-0	Created By:	Dan Edge
Date Created:	07.19.2013 9:37 AM	Submitted For Review By:	Dan Edge
Date Submitted For Review:	07.19.2013	Baseline Finish Range:	07.22.2013 - 07.22.2013
Submittal Coordinator:	Dan Edge (e-Builder, Inc.)		
Baseline Start Range:	07.22.2013 - 07.22.2013		

Items (4) Documents (0) Comments (0) Custom Fields (1) Revisions (0)

Group By: None Page 1 of 1 Show 25 per page Forward

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Held By
	Fire Extinguisher System	12	0	15302	a	Product Data	On Hold	Dan Edge
	Fire Extinguisher System	13	0	15302	b	Shop Drawing	Approved	Dan Edge
	Fire Extinguisher System	14	0	15302	c	Product Data	Rejected	Dan Edge
	Fire Extinguisher System	15	0	15302	d	Test Report	Approved	Dan Edge

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**.

Send To Contractor

Send To Contractor

Cancel

Project:	Dedge Hammer
Project Number:	
Title:	Main Fire Extinguisher System
* <u>Send To:</u>	Dan Edge
CC:	<div style="display: flex; align-items: flex-start;"><div style="border: 1px solid #ccc; padding: 5px; width: 250px;"><p>-- Roles --</p><p>Accounting</p><p>Approver</p><p>Architect</p><p>Associate Project Manager</p><p>Bid Manager</p><p>Construction Manager</p><p>Consultant</p><p>Contractor</p><p>Design Professional</p></div><div style="margin: 0 10px; text-align: center;"><p>></p><p><</p></div><div style="border: 1px solid #ccc; width: 200px; height: 100px;"></div></div>
CC External Users Via Email:	<div style="border: 1px solid #ccc; height: 100px;"></div>
	<p>Lookup You can add additional email addresses one per line or separate them with a semicolon ";".</p>
** Select folder for external user to attach files:	<p>[Select folder]</p>



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.

Submittal Package Details

Submittal Package Overview | History

Request Comment | Update Dates | Send For Review | Generate Transmittal | Close | Edit

Project:	Dedge Hammer	Project Number:	
Title:	Main Fire Extinguisher System	Status:	Approved
Description:		Trade:	
Submittal Package #:	1-0	Created By:	Dan Edge
Date Created:	07.19.2013 9:37 AM	Submitted For Review By:	
Date Submitted For Review:		Baseline Finish Range:	07.22.2013 - 07.22.2013
Submittal Coordinator:	Dan Edge (e-Builder, Inc.)		
Baseline Start Range:	07.22.2013 - 07.22.2013		

Items (4) | Documents (0) | Comments (0) | Custom Fields (1) | Revisions (0)

Group By: None | Page 1 of 1 | Show 25 per page | Send to Sub | **Create Revision** | Add Items | Remove Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Held By
<input checked="" type="checkbox"/>	Fire Extinguisher System	12	0	15302	a	Product Data	ONH	Dan Edge
<input type="checkbox"/>	Fire Extinguisher System	13	0	15302	b	Shop Drawing	APP	Dan Edge
<input checked="" type="checkbox"/>	Fire Extinguisher System	14	0	15302	c	Product Data	REJ	Dan Edge

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.



Submittal Package Details

Submittal Package Overview History

Request Comment Update Dates Generate Transmittal **Close** Edit

Project:	Dedge Hammer	Project Number:	
Title:	Main Fire Extinguisher System	Status:	Approved
Description:		Trade:	
Submittal Package #:	1-0	Created By:	Dan Edge
Date Created:	07.19.2013 9:37 AM	Submitted For Review By:	
Date Submitted For Review:		Baseline Finish Range:	07.22.2013 - 07.22.2013
Submittal Coordinator:	Dan Edge (e-Builder, Inc.)		
Baseline Start Range:	07.22.2013 - 07.22.2013		

Items (4) Documents (0) Comments (0) Custom Fields (1) Revisions (1)

Group By: None Page 1 of 1 Show 25 per page Send to Sub Create Revision

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Held By
<input type="checkbox"/>	Fire Extinguisher System	12	0	15302	a	Product Data	ONH	
<input type="checkbox"/>	Fire Extinguisher System	13	0	15302	b	Shop Drawing	APP	Dan Edge
<input type="checkbox"/>	Fire Extinguisher System	14	0	15302	c	Product Data	REJ	
<input type="checkbox"/>	Fire Extinguisher System	15	0	15302	d	Test Report	APP	Dan Edge

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?*