e-BUILDER TIPS OF THE MONTH

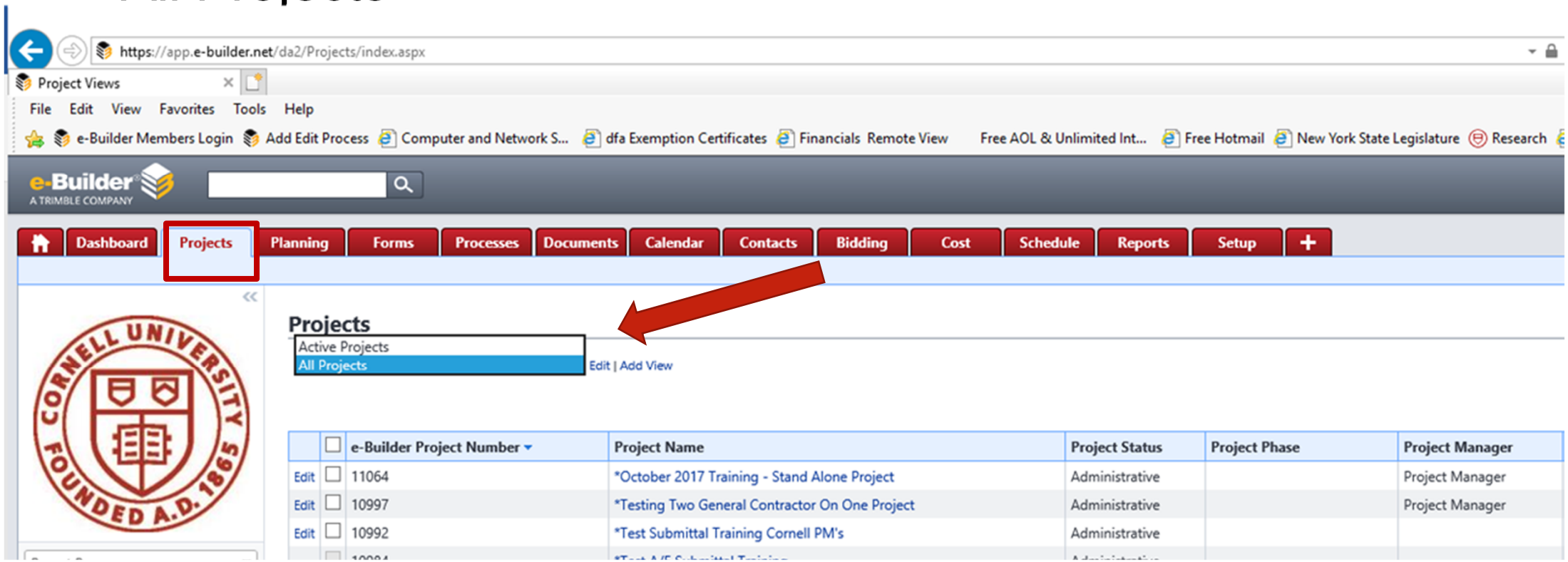
November 2018

Views:

- Available on All Modules
- Account Views Set by Administrators
- Personal Views Set by Individual Users

Projects Module Account Views:

- Active Projects
- All Projects

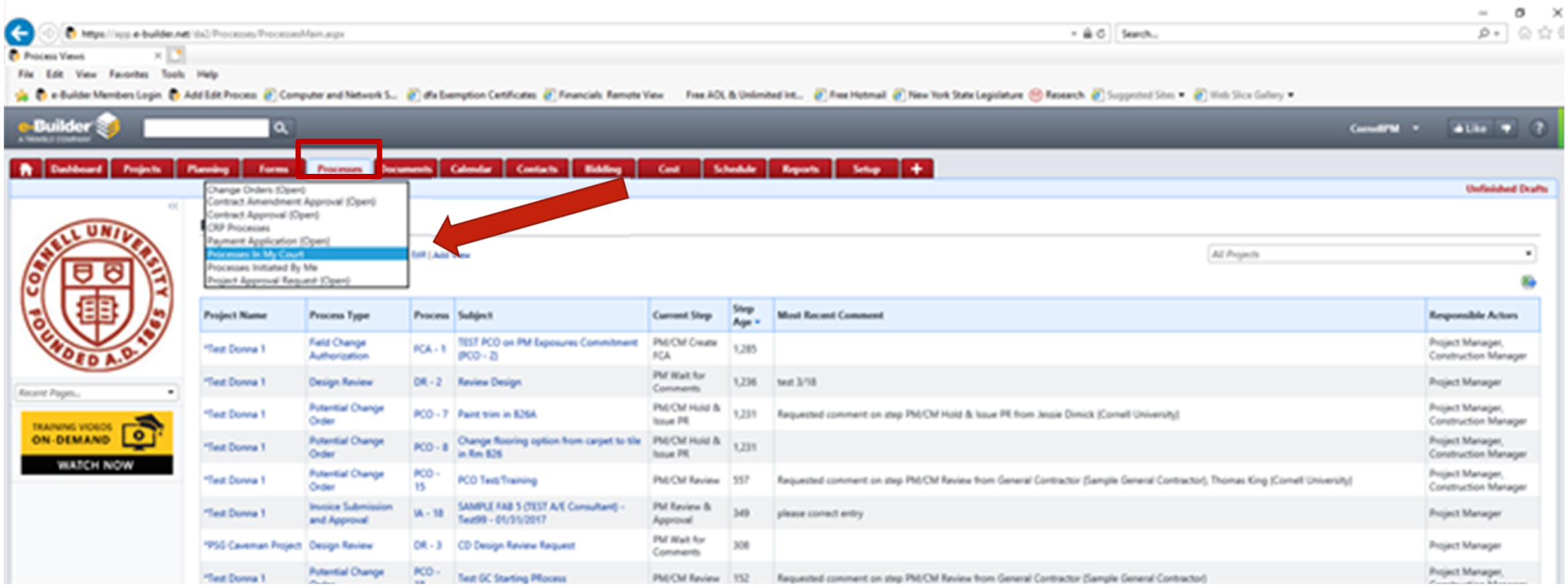


Processes Module Account Views:

- Change Orders (Open)
- Contract Amendment Approval (Open)
- Contract Approval (Open)
- Payment Application (Open)
- Processes In My Court
- Processes Initiated By Me
- Project Approval Request (Open)

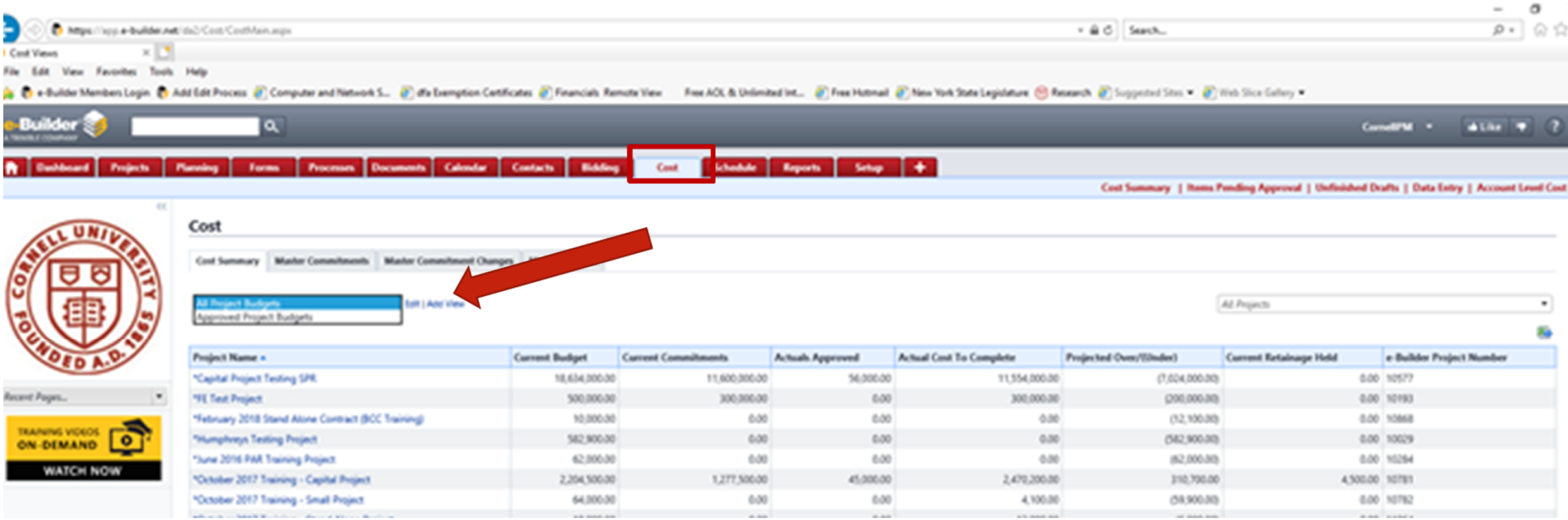
TIP: VIEWS

Processes Module Account Views:

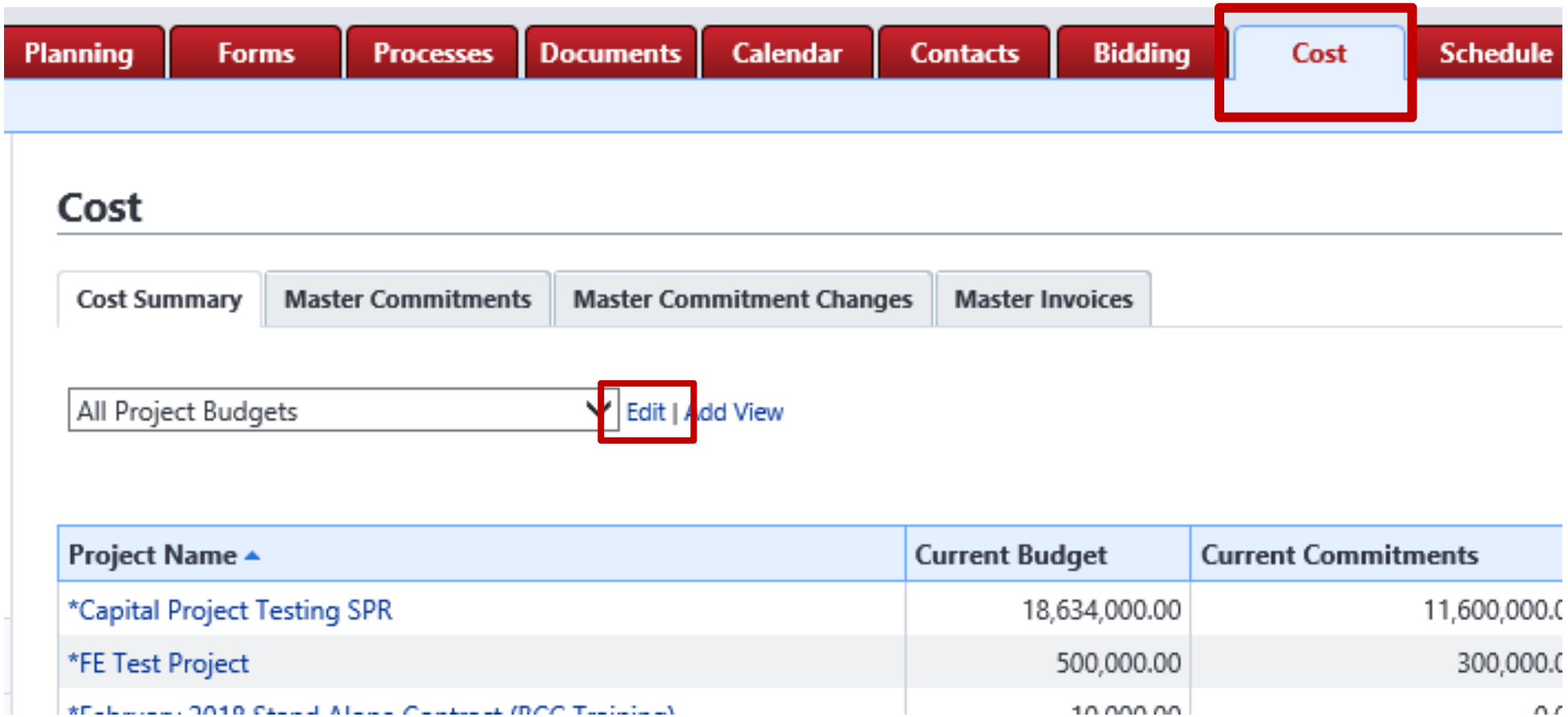


Cost Module Account Views:

- All Project Budgets
- Approved Project Budgets



Add Personal Views:



TIP: VIEWS

Edit View

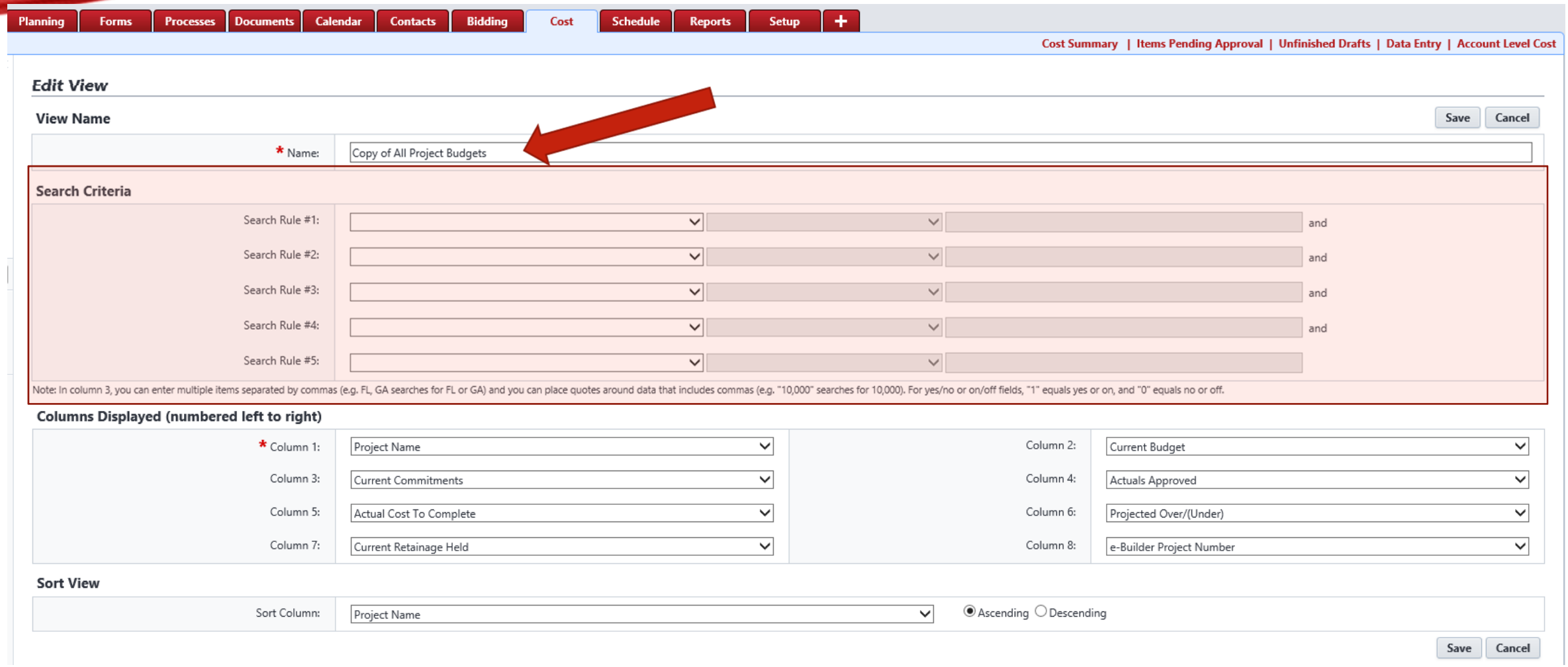
You cannot edit the following Account View: All Project Budgets

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

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

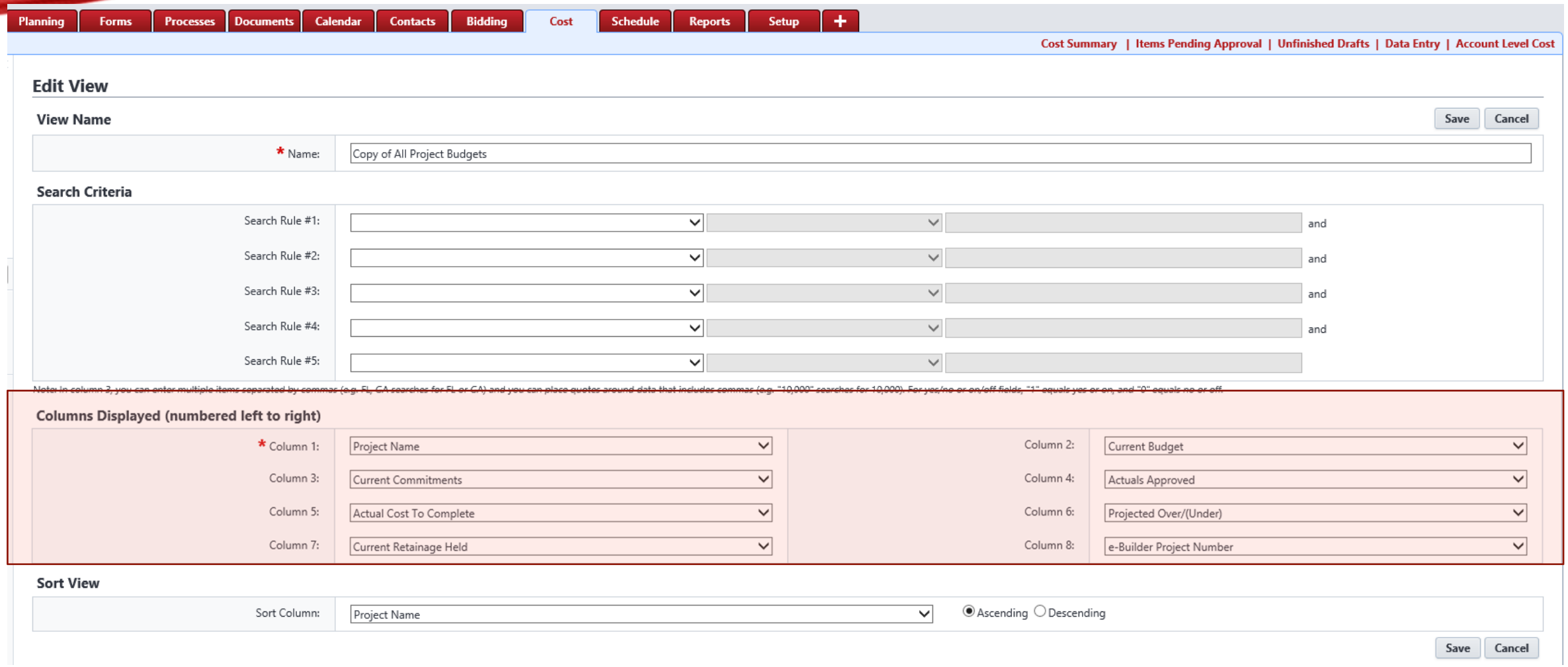
Continue Cancel

TIP: VIEWS

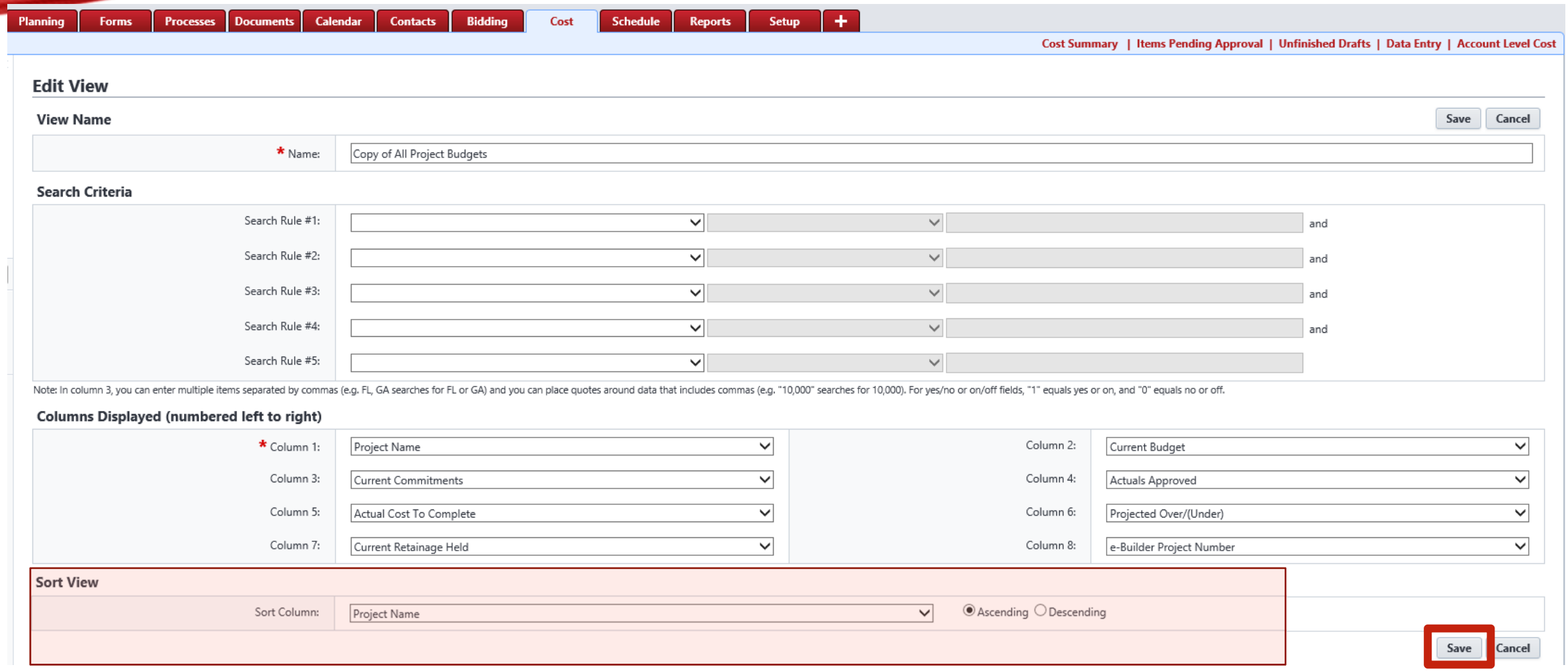


Go to e-Builder

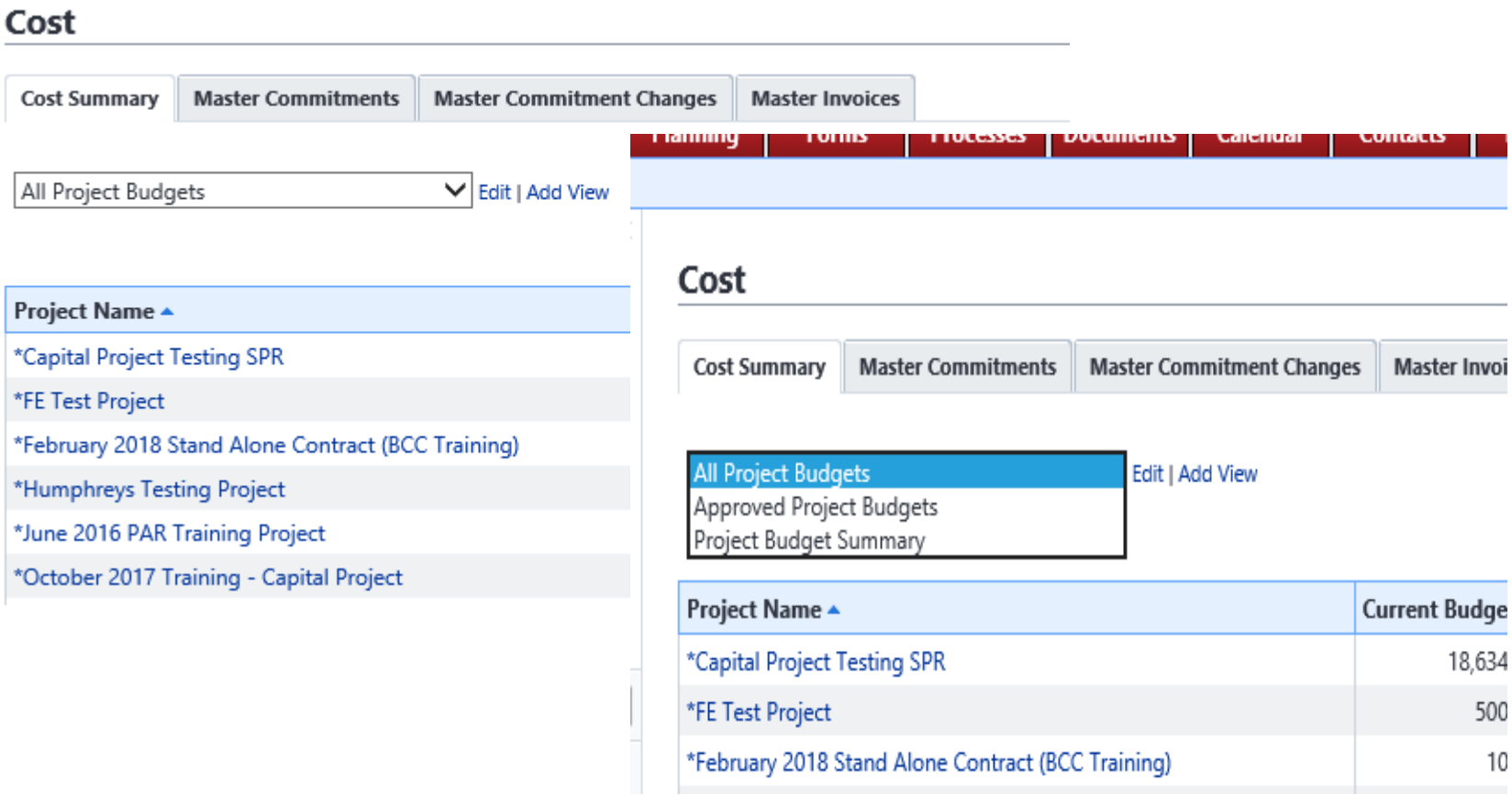
TIP: VIEWS


Planning
Forms
Processes
Documents
Calendar
Contacts
Bidding
Cost
Schedule
Reports
Setup
Cost Summary | Items Pending Approval | Unfinished Drafts | Data Entry | Account Level Cost
Edit View
View Name
Save
Cancel
* Name:
Copy of All Project Budgets
Search Criteria
Search Rule #1:
Search Rule #2:
Search Rule #3:
Search Rule #4:
Search Rule #5:
and
Columns Displayed (numbered left to right)
* Column 1:
Project Name
Column 2:
Current Budget
Column 3:
Current Commitments
Column 4:
Actuals Approved
Column 5:
Actual Cost To Complete
Column 6:
Projected Over/(Under)
Column 7:
Current Retainage Held
Column 8:
e-Builder Project Number
Sort View
Sort Column:
Project Name
Ascending
Descending
Save
Cancel

TIP: VIEWS


Planning
Forms
Processes
Documents
Calendar
Contacts
Bidding
Cost
Schedule
Reports
Setup
Cost Summary | Items Pending Approval | Unfinished Drafts | Data Entry | Account Level Cost
Edit View
View Name
Save
Cancel
* Name:
Copy of All Project Budgets
Search Criteria
Search Rule #1:
Search Rule #2:
Search Rule #3:
Search Rule #4:
Search Rule #5:
and
Note: In column 3, you can enter multiple items separated by commas (e.g. FL, GA searches for FL or GA) and you can place quotes around data that includes commas (e.g. "10,000" searches for 10,000). For yes/no or on/off fields, "1" equals yes or on, and "0" equals no or off.
Columns Displayed (numbered left to right)
* Column 1:
Project Name
Column 2:
Current Budget
Column 3:
Current Commitments
Column 4:
Actuals Approved
Column 5:
Actual Cost To Complete
Column 6:
Projected Over/(Under)
Column 7:
Current Retainage Held
Column 8:
e-Builder Project Number
Sort View
Sort Column:
Project Name
Ascending
Descending
Save
Cancel

TIP: VIEWS


Cost
Cost Summary
Master Commitments
Master Commitment Changes
Master Invoices
All Project Budgets
Edit | Add View
Project Name
*Capital Project Testing SPR
*FE Test Project
*February 2018 Stand Alone Contract (BCC Training)
*Humphreys Testing Project
*June 2016 PAR Training Project
*October 2017 Training - Capital Project
Cost
Cost Summary
Master Commitments
Master Commitment Changes
Master Invoi
All Project Budgets
Approved Project Budgets
Project Budget Summary
Edit | Add View
Project Name
Current Budge
*Capital Project Testing SPR
18,634
*FE Test Project
500
*February 2018 Stand Alone Contract (BCC Training)
10

TIP: VIEWS

Cost

Cost Summary | Master Commitments | Master Commitment Changes | Master Invoices

Project Budget Summary Edit | Add View

All Projects

e-Builder Project Number	Project Name	Project Account Activated?	Project Account Number	Current Budget	Current Commitments	Net Actuals Paid	Unallocated Reserve
10577	*Capital Project Testing SPR	No	IT-R58XXXX	18,634,000.00	11,600,000.00	56,000.00	7,024,000.00
10193	*FE Test Project	No		500,000.00	300,000.00	0.00	200,000.00
10868	*February 2018 Stand Alone Contract (BCC Training)	No	IT-xxxxxxx	10,000.00	0.00	0.00	10,000.00
10029	*Humphreys Testing Project			582,900.00	0.00	0.00	582,900.00
10284	*June 2016 PAR Training Project	No		62,000.00	0.00	0.00	62,000.00
10781	*October 2017 Training - Capital Project	No	IT-X234567	2,204,500.00	1,277,500.00	40,500.00	690,300.00
10782	*October 2017 Training - Small Project	No	IT-TRAIN17-OCT11	64,000.00	0.00	0.00	59,900.00
11064	*October 2017 Training - Stand Alone Project	No	IT-X234567	18,000.00	0.00	0.00	6,000.00
10013	*PSG Caveman Project			132,000.00	16,000.00	0.00	116,000.00
10161	*PSG Testing Project	No		285,000.00	150,000.00	0.00	123,000.00
10286	*Schedule Module Training - June 2016	No		0.00	0.00	0.00	0.00
10288	*Schedule Training 2 - June 2016	No					
10229	*Test - Small Project Budget Change	No		93,000.00	0.00	0.00	93,000.00
10055	*Test Donna 1	No	IT-Test1; ITTest2	50,995,600.00	4,325,840.00	4,185.00	46,636,460.00
10898	*Test Kelly 1	No	IT-Test1; IT-Test2	200,000.00	20,000.00	0.00	50,000.00
00009	*Test PCO Process Revisions - June 2016	No	IT-RXXTUVX	1,000,000.00	750,000.00	0.00	235,500.00
10981	*Test PM Submittal Training	No	IT-				
10992	*Test Submittal Training Cornell PM's	No	IT-Submittal Training				
10964							
10997							
Totals				**77,281,000.00**	**20,029,340.00**	**100,685.00**	**56,799,060.00**

TIP: VIEWS

Cost

Cost Summary | Master Commitments | Master Commitment Changes | Master Invoices

Project Budget Summary — Edit | Add View

All Projects

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10029	*Humphreys Testing Project			582,900.00	0.00	0.00	582,900.00
10284	*June 2016 PAR Training Project	No		62,000.00	0.00	0.00	62,000.00
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10964							
10997							
Totals				77,281,000.00	20,029,340.00	100,685.00	56,799,060.00

e-BUILDER QUESTIONS?

November 2018