



# e-BUILDER TIPS OF THE MONTH

November 2018

## Views:

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

TIP: VIEWS

# Projects Module Account Views:

- Active Projects
- All Projects

The screenshot shows the e-Builder web application interface. The browser address bar displays <https://app.e-builder.net/da2/Projects/index.aspx>. The application header includes the e-Builder logo and a search bar. A navigation menu contains several items: Home, Dashboard, **Projects** (highlighted with a red box), Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, Setup, and a plus sign. Below the navigation menu, the 'Projects' section is active, showing a dropdown menu with 'Active Projects' and 'All Projects' options. A red arrow points to the dropdown menu. Below the dropdown is a table of project data.

	<input type="checkbox"/> e-Builder Project Number ▾	Project Name	Project Status	Project Phase	Project Manager
Edit	<input type="checkbox"/> 11064	*October 2017 Training - Stand Alone Project	Administrative		Project Manager
Edit	<input type="checkbox"/> 10997	*Testing Two General Contractor On One Project	Administrative		Project Manager
Edit	<input type="checkbox"/> 10992	*Test Submittal Training Cornell PM's	Administrative		
	<input type="checkbox"/> 10004	*Test A/C Submittal Training	Administrative		

## 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:

The screenshot shows the Builder software interface. The top navigation bar includes 'Dashboard', 'Projects', 'Planning', 'Forms', 'Processes', 'Documents', 'Calendar', 'Contacts', 'Bidding', 'Cost', 'Schedule', 'Reports', and 'Setup'. The 'Processes' menu is highlighted with a red box, and a dropdown menu is open, showing options like 'Change Orders (Open)', 'Contract Amendment Approval (Open)', 'Contract Approval (Open)', 'DRP Processes', 'Equipment Application (Open)', 'Processes in My Court', 'Processes Initiated By Me', and 'Project Approval Request (Open)'. A red arrow points to the 'Processes in My Court' option. Below the menu is a table of process entries.

Project Name	Process Type	Process	Subject	Current Step	Step Age	Most Recent Comment	Responsible Action
*Test Donna 1	Field Change Authorization	PCA - 1	TEST PCO on PM Exposures Commitment (PCO - 2)	PM/CM Create PCA	1,285		Project Manager, Construction Manager
*Test Donna 1	Design Review	DR - 2	Review Design	PM Wait for Comments	1,236	test 3/18	Project Manager
*Test Donna 1	Potential Change Order	PCO - 7	Paint trim in E25A	PM/CM Hold & Issue PR	1,231	Requested comment on step PM/CM Hold & Issue PR from Jessie Dimick (Cornell University)	Project Manager, Construction Manager
*Test Donna 1	Potential Change Order	PCO - 8	Change flooring option from carpet to tile in Rm E26	PM/CM Hold & Issue PR	1,231		Project Manager, Construction Manager
*Test Donna 1	Potential Change Order	PCO - 15	PCO Test/Training	PM/CM Review	557	Requested comment on step PM/CM Review from General Contractor (Sample General Contractor), Thomas King (Cornell University)	Project Manager, Construction Manager
*Test Donna 1	Invoice Submission and Approval	IA - 18	SAMPLE FAB 5 (TEST A/E Consultant) - Test09 - 01/31/2017	PM Review & Approval	349	please correct entry	Project Manager
*PSG Caveman Project	Design Review	DR - 3	CD Design Review Request	PM Wait for Comments	308		Project Manager
*Test Donna 1	Potential Change Order	PCO - 11	Test GC Starting PProcess	PM/CM Review	152	Requested comment on step PM/CM Review from General Contractor (Sample General Contractor)	Project Manager, Construction Manager



TIP: VIEWS

# Cost Module Account Views:

- All Project Budgets
- Approved Project Budgets

The screenshot shows the e-Builder software interface. The 'Cost' menu item is highlighted with a red box. A red arrow points to the 'Approved Project Budgets' view selection in the 'Cost' section. A table of project budgets is visible below.

Project Name	Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/Under	Current Retainage Held	e-Builder Project Number
*Capital Project Testing SPR	18,634,300.00	11,600,300.00	56,300.00	11,554,000.00	(7,024,000.00)	0.00	10177
*E Test Project	500,000.00	300,000.00	0.00	300,000.00	(200,000.00)	0.00	10193
*February 2018 Stand Alone Contract (BOC Training)	10,000.00	0.00	0.00	0.00	(12,100.00)	0.00	10868
*Humphreys Testing Project	582,800.00	0.00	0.00	0.00	(582,800.00)	0.00	10029
*June 2018 PAR Training Project	62,000.00	0.00	0.00	0.00	(62,000.00)	0.00	10294
*October 2017 Training - Capital Project	2,204,500.00	1,277,500.00	45,000.00	2,470,200.00	310,700.00	4,500.00	10781
*October 2017 Training - Small Project	64,000.00	0.00	0.00	4,100.00	(58,900.00)	0.00	10782

# Add Personal Views:

The screenshot shows a software interface with a navigation bar at the top containing tabs for Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, and Schedule. The 'Cost' tab is highlighted with a red box. Below the navigation bar, there are sub-tabs for Cost Summary, Master Commitments, Master Commitment Changes, and Master Invoices. A dropdown menu is open, showing 'All Project Budgets' with 'Edit' and 'Add View' options. Below this is a table with columns for Project Name, Current Budget, and Current Commitments.

Project Name ▲	Current Budget	Current Commitments
*Capital Project Testing SPR	18,634,000.00	11,600,000.00
*FE Test Project	500,000.00	300,000.00
*February 2018 Stand Alone Contract (BOC Training)	10,000.00	0.00

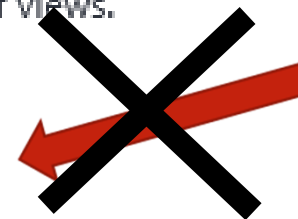
## Edit View

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**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.

- 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

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:  

#### Search Criteria

Search Rule #1:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #2:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #3:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #4:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #5:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	

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:	<input type="text" value="Project Name"/>	▼	Column 2:	<input type="text" value="Current Budget"/>	▼
Column 3:	<input type="text" value="Current Commitments"/>	▼	Column 4:	<input type="text" value="Actuals Approved"/>	▼
Column 5:	<input type="text" value="Actual Cost To Complete"/>	▼	Column 6:	<input type="text" value="Projected Over/(Under)"/>	▼
Column 7:	<input type="text" value="Current Retainage Held"/>	▼	Column 8:	<input type="text" value="e-Builder Project Number"/>	▼

#### Sort View

Sort Column:  ▼  Ascending  Descending

Save Cancel

[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:

### Search Criteria

Search Rule #1:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #2:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #3:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #4:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #5:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	

Note: In column 2, you can enter multiple items separated by commas (e.g. FL, CA searches for FL or CA) 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:	<input type="text" value="Project Name"/>	▼	Column 2:	<input type="text" value="Current Budget"/>	▼
Column 3:	<input type="text" value="Current Commitments"/>	▼	Column 4:	<input type="text" value="Actuals Approved"/>	▼
Column 5:	<input type="text" value="Actual Cost To Complete"/>	▼	Column 6:	<input type="text" value="Projected Over/(Under)"/>	▼
Column 7:	<input type="text" value="Current Retainage Held"/>	▼	Column 8:	<input type="text" value="e-Builder Project Number"/>	▼

### Sort View

Sort Column:  ▼  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:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #2:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #3:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #4:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	and
Search Rule #5:	<input type="text"/>	▼	<input type="text"/>	▼	<input type="text"/>	

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### 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

- Planning
- Forms
- Processes
- Documents
- Calendar
- Contacts

## Cost

- Cost Summary
- Master Commitments
- Master Commitment Changes
- Master Invoices

All Project Budgets  Edit | Add View

- Approved Project Budgets
- Project Budget Summary

Project Name ▲	Current Budget
*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

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 Trainino Cornell PM's	No	IT-Submittal Trainino				
10964							
10997							
<b>Totals</b>							
	<b>77,281,000.00</b>		<b>20,029,340.00</b>		<b>100,685.00</b>		<b>56,799,060.00</b>

# TIP: VIEWS

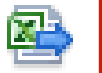
## Cost

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 Re
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
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11064	*October 2017 Training - Stand Alone Project	No	IT-X234567	18,000.00	0.00	0.00	6,000.00
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10055	*Test Donna 1	No	IT-Test1; ITTest2	50,995,600.00	4,325,840.00	4,185.00	46,636,460.00
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10964							
10997							
<b>Totals</b>							
	<b>77,281,000.00</b>		<b>20,029,340.00</b>		<b>100,685.00</b>		<b>56,799,060.00</b>





# e-BUILDER QUESTIONS?

November 2018