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*TO UPLOAD FILES ONE AT A TIME:*

1. Log into the e-Buildr system.
2. Click on the Files menu.
3. Click on the Upload Files button.
4. Select the file you want to upload.
5. Click on the Upload button.

*TO UPLOAD MULTIPLE FILES:*

1. Log into the e-Buildr system.
2. Click on the Files menu.
3. Click on the Upload Multiple Files button.
4. Select the files you want to upload.
5. Click on the Upload button.

*VIEWING DOCUMENTS:*

1. Log into the e-Buildr system.
2. Click on the Documents menu.
3. Click on the View Documents button.
4. Select the document you want to view.
5. Click on the View button.

*REDLINING DOCUMENTS:*

1. Log into the e-Buildr system.
2. Click on the Documents menu.
3. Click on the Redline Documents button.
4. Select the document you want to redline.
5. Click on the Redline button.

*DELETING DOCUMENTS:*

1. Log into the e-Buildr system.
2. Click on the Documents menu.
3. Click on the Delete Documents button.
4. Select the document you want to delete.
5. Click on the Delete button.

*DOWNLOADING DOCUMENTS:*

1. Log into the e-Buildr system.
2. Click on the Documents menu.
3. Click on the Download Documents button.
4. Select the document you want to download.
5. Click on the Download button.

*MOVING DOCUMENTS:*

1. Log into the e-Buildr system.
2. Click on the Documents menu.
3. Click on the Move Documents button.
4. Select the document you want to move.
5. Select the destination folder.
6. Click on the Move button.

*COPYING DOCUMENTS:*

1. Log into the e-Buildr system.
2. Click on the Documents menu.
3. Click on the Copy Documents button.
4. Select the document you want to copy.
5. Select the destination folder.
6. Click on the Copy button.

*CHECKING OUT DOCUMENTS:*

1. Log into the e-Buildr system.
2. Click on the Documents menu.
3. Click on the Check Out Documents button.
4. Select the document you want to check out.
5. Click on the Check Out button.

*SENDING DOCUMENTS:*

1. Log into the e-Buildr system.
2. Click on the Documents menu.
3. Click on the Send Documents button.
4. Select the document you want to send.
5. Fill in the recipient details.
6. Click on the Send button.

*FORMS MODULE:*

1. Log into the e-Buildr system.
2. Click on the Forms menu.
3. Click on the Forms Module button.
4. Click on the Form button.
5. Fill in the form details.
6. Click on the Submit button.

*INITIATING A FORM:*

1. Log into the e-Buildr system.
2. Click on the Forms menu.
3. Click on the Initiate Form button.
4. Select the form you want to initiate.
5. Fill in the form details.
6. Click on the Initiate button.

*COMMENTING ON A FORM:*

1. Log into the e-Buildr system.
2. Click on the Forms menu.
3. Click on the Comment on Form button.
4. Select the form you want to comment on.
5. Fill in the comment details.
6. Click on the Comment button.

*REPLYING TO A WORKFLOW FORM:*

1. Log into the e-Buildr system.
2. Click on the Forms menu.
3. Click on the Reply to Workflow Form button.
4. Select the form you want to reply to.
5. Fill in the reply details.
6. Click on the Reply button.

*REQUESTING EXTERNAL COMMENT:*

1. Log into the e-Buildr system.
2. Click on the Forms menu.
3. Click on the Request External Comment button.
4. Select the form you want to request external comment.
5. Fill in the request details.
6. Click on the Request button.

*TRACKING HISTORY:*

1. Log into the e-Buildr system.
2. Click on the Forms menu.
3. Click on the Track History button.
4. Select the form you want to track.
5. Click on the Track button.

*CLOSING A FORM:*

1. Log into the e-Buildr system.
2. Click on the Forms menu.
3. Click on the Close Form button.
4. Select the form you want to close.
5. Click on the Close button.

*USING FORM FILTERS:*

1. Log into the e-Buildr system.
2. Click on the Forms menu.
3. Click on the Filter Forms button.
4. Select the form you want to filter.
5. Fill in the filter details.
6. Click on the Filter button.

*PROCESS MODULE:*

1. Log into the e-Buildr system.
2. Click on the Processes menu.
3. Click on the Process Module button.
4. Click on the Process button.
5. Fill in the process details.
6. Click on the Submit button.

*INITIATING A PROCESS:*

1. Log into the e-Buildr system.
2. Click on the Processes menu.
3. Click on the Initiate Process button.
4. Select the process you want to initiate.
5. Fill in the process details.
6. Click on the Initiate button.

*RESPONDING TO A PROCESS:*

1. Log into the e-Buildr system.
2. Click on the Processes menu.
3. Click on the Respond to Process button.
4. Select the process you want to respond to.
5. Fill in the response details.
6. Click on the Respond button.

*ADDING A COMMENT:*

1. Log into the e-Buildr system.
2. Click on the Processes menu.
3. Click on the Add Comment button.
4. Select the process you want to add comment.
5. Fill in the comment details.
6. Click on the Add Comment button.

*REQUEST EXTERNAL COMMENTS:*

1. Log into the e-Buildr system.
2. Click on the Processes menu.
3. Click on the Request External Comments button.
4. Select the process you want to request external comments.
5. Fill in the request details.
6. Click on the Request button.

*SCHEDULE MODULE:*

1. Log into the e-Buildr system.
2. Click on the Schedules menu.
3. Click on the Schedule Module button.
4. Click on the Schedule button.
5. Fill in the schedule details.
6. Click on the Submit button.

*CREATING A SCHEDULE:*

1. Log into the e-Buildr system.
2. Click on the Schedules menu.
3. Click on the Create Schedule button.
4. Fill in the schedule details.
5. Click on the Create button.

*ACTIVATING THE SCHEDULE:*

1. Log into the e-Buildr system.
2. Click on the Schedules menu.
3. Click on the Activate Schedule button.
4. Select the schedule you want to activate.
5. Click on the Activate button.

*SAVING A BASELINE:*

1. Log into the e-Buildr system.
2. Click on the Schedules menu.
3. Click on the Save Baseline button.
4. Select the schedule you want to save.
5. Click on the Save button.

*UPDATING TASKS:*

1. Log into the e-Buildr system.
2. Click on the Schedules menu.
3. Click on the Update Tasks button.
4. Select the schedule you want to update.
5. Fill in the update details.
6. Click on the Update button.

*CALENDAR MODULE:*

1. Log into the e-Buildr system.
2. Click on the Calendar menu.
3. Click on the Calendar Module button.
4. Click on the Calendar button.
5. Fill in the calendar details.
6. Click on the Submit button.
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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.

4. Click **Install** to download desired tool. *(It is recommended to download all tools)*
The following will show what each tool looks like before and after installed:

---

**Multi-File Upload in Progress**

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

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

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

---

**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 (71). 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?

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

First-time e-Builder Users

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

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

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

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

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

Configure Your Settings

Use the menu on the left to customize settings within Setup.
Membership: The membership link allows you to view what roles or projects you are associated with.

Personal Information: Here, the user can update profile information and change current password.

Preferences: Here, the user can specify notification and interface settings. (Note: Default values are already in place and normally sufficient)
  - Notification Settings: Check/Uncheck appropriate check boxes to alter which e-Builder actions/occurrences notify the user.
  - Interface Settings: The Interface link allows users to change the default settings for items such as folders, subfolders, automatic spell check, single sign-on etc.

Schedule: Manage any schedule templates here, if applicable.

Subscriptions: The subscriptions allow users to set up automatic delivery of reports.

Views: The Views link allows users to view what/how information is displayed under each module.

Using the Help Function

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

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

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

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

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

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

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

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

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

1. Go to Setup.

2. Under My Setup click Membership.

3. Click Projects, a list of projects you are associated with will appear.

4. Click Add Project.

5. Enter the “Details” information and any relevant “Custom Fields” information. (required fields are noted in red)

6. Once all fields are entered, click Save. You will now be in the Project Module.
7. Under the Project Details menu on the left, click **Apply Templates**. This is where the user will allow new project to inherit properties and characteristics from past projects (or designated project templates). (It decreases project setup time)

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

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

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

13. If you would like to notify the users that they have been added to the project (email notification) click the **Notify users added to site**. If you would like to provide the user with their user name and password, check the **Include username and password** box (username and password included in
email). It is recommended to notify users and provide username and password if not already in e-Builder system.

14. Click Save.

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

Accessing Your Projects

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

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

Editing Custom Fields

1. Once in the project, click on Edit on the upper right-hand side of your screen.
2. **Make the necessary changes and click Save.**

**Edit Project**

**Project Participants**

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

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

1. Click Manage Users.

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

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

4. Click Save.
Sending a Message

1. **Choose the users you would like to send a message to by checking the box to the left of the user name.** If you would like to send a message to all, click on the first box under the user field.

2. **Click Send Message.** (Allow Pop-Ups if prompted)

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

4. **Click Send.**

5. **If you would like to send the user a welcome message, place check marks in the boxes next to “Include Welcome Message” and/or “Send Username and Password Notification”.**
Removing Users from a Project

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

2. Click Remove from Project.

Reassigning Work

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

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

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

Cost Module

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

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

1. Go to the Cost tab.

2. Select the project you need to create the budget for.
3. 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.
6. **Press Continue to confirm.**

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

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

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

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

Budget Changes
1. Go to the Cost tab.
2. Select the project you wish to change the budget for.
3. Click on the Budget Details link on the lower left hand side of the screen.
4. Click the Budget Changes tab in the middle of the screen.
5. Click on the Add Change button.
6. Fill out the budget change information.

7. Click on the **Save & Add 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.

8. Confirm change by clicking **Continue**.

9. Press **Save** button if satisfied with changes.
** See instructions below to add a Note, document, form, or process to a budget change.

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

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

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

2. **Select Budget Changes.**

3. **Select specific Budget Change.**

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

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

Entering Commitments

1. Go to the Cost tab.
2. Select the project you need to enter the commitment for.
3. Click on the Commitments link on the lower left hand side of the screen.
4. Click the Add Commitment button.
5. Enter required commitment information.

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

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

8. Click on the **Save & Add New** button if the commitment has more than one item or click on the **Save** button if this is the only item in the commitment (or if this is the last item).
9. Click on the center tabs and attach documents, forms, notes, or processes if needed by clicking Attach button.

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

Commitment Changes

1. Go to the Cost tab.

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

3. Click on the Commitments link on the lower left hand side of the screen.
4. Click on the commitment number or description of the appropriate item.

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

6. Click on the Add Change button.

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

8. Add Commitment Change Item by filling in required information and clicking Save. (Note: click Save & Add New to add multiple items on this screen vs. restarting the process.)
9. Click on the center tabs and Attach button to attach notes, documents, forms, or processes if needed.

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

Actual Costs/Invoices

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

Creating an Invoice

1. Go to the Cost tab.

2. Select the project you need to enter the invoice for.

3. Click on the Actual Costs link on the lower left hand side of the screen.
4. **Click the Add Invoice button.**

Quick Cost Summary

<table>
<thead>
<tr>
<th>Current Budget</th>
<th>Current Commitments</th>
<th>Actuals Approved</th>
<th>Actual Cost To Complete</th>
<th>Projected Over/(Under)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.09</td>
<td>0.00</td>
</tr>
</tbody>
</table>

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

6. **Select the commitment from the commitment drop down list and enter the dollar amount for each commitment item.**
7. **Click the Save & Add New** or click the **Save** button if this is the only item in the commitment (or if this is the last item).

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

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

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

Detail Mode (forecasting of individual commitments)
1. Click on the Cost tab at the top of the screen.
2. Select the project for which you would like to create a forecast.
3. Click the Forecasts link under the Cost Menu on the left side of the screen.
4. Click on the Add Forecast button.
5. Select a period to allow forecasting to place after and click **Continue**.

6. A required name is auto-generated but can be changed if desired.

7. The ‘Calculate Unallocated Reserve’ check-box is checked by default. The ‘Unallocated Reserve’ is the difference between budget and projected commitments. A ‘check’ in this box yields an ‘Estimate at Completion’ that is equal to your budget, assuming that your project will finish on budget.

8. De-select the ‘Calculate Unallocated Reserve’ check-box when you are ready to begin forecasting commitments.

9. Enter a description, assumption, and amount for a forecasted commitment and click the **Add** link.

   **NOTE:** The ‘Budgeted’ check box indicates that the amount of your forecasted commitment has been accounted for in the budget. De-select this box if that is not the case.
10. When you have completed your forecast, click the **Save Draft** or **Save Final** button.

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

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

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

2. **Select the project for which you would like to create a forecast.**

3. **Click the Forecasts link under the Cost Menu on the left side of the screen.**
4. Click on the Add Forecast button.

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

6. Click the Switch to Adjustment Mode button.

7. A required name is auto-generated but can be changed if desired.

8. The ‘Calculate Unallocated Reserve’ check-box is checked by default. The ‘Unallocated Reserve’ is the difference between budget and projected commitments. A ‘check’ in this box yields an ‘Estimate at Completion’ that is equal to your budget, assuming that your project will finish on budget.

9. De-select the ‘Calculate Unallocated Reserve’ check-box when you are ready to begin forecasting by adjusting your ‘Estimate at Completion’.
NOTE: Adjustments can be entered as negative values. When an adjustment is reflected in e-Builder via a Commitment or Change Order process, access the forecast for the appropriate budget line item and enter a negative value equal to the Commitment or Change Order value to ensure that your 'Estimate at Completion' is adjusted accordingly.

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

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

Cash Flow

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

1. Click on the Cost tab at the top of the screen.
2. Select the project for which you would like to create a Cash Flow.

3. Click the Cash Flow link under the Cost Menu on the left side of the screen.

4. Click on the Setup Cash Flow button.

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

6. Click the Update Cash Flow button.
7. Select the two options for which you would like to ‘Forecast cash flow using.’ Your remaining to be allocated will be the difference between the two selections that you have made.

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

9. Click **Save**.

**Documents Module**

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

Uploading Documents

To upload files one at a time:

1. *Click on the Documents tab.*

2. *Select the project you wish to upload the documents to.*

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

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

---

*Uploading Documents*
5. *Select a file on your computer and press Open.*
6. Click the **Upload Now** button.
To upload multiple files:

1. **Click on the Documents tab**
2. Select the project you wish to upload the documents to.
3. Select the folder you wish to upload documents into
4. Click the Upload link.
5. **Open Window Explorer on computer.**

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

7. **Drag and drop selected files into e-Builder upload window.**
8. Use the check boxes on the left to select files to upload and press **Upload Now**.
Viewing Documents

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

2. **Select the project containing the documents you wish to view.**

3. **Navigate to desired documents by selecting appropriate folder.**
4. **View document by clicking bold text of document.**

Redlining Documents

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

1. **Click on the name of the folder where the document is stored.** (See Viewing Documents above if needed)
2. **Click on the Redline link below the file name.** A new window opens.
3. **Click the Markup Icon and select New.**
4. Use the tools on the left-hand side of screen to mark up the file.

5. Click the Markup icon again and select Save As.
6. Enter the name of your markup and click **OK**.

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

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

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

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

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

4. Click the **OK** button. The selection will be deleted.
* Documents in e-Builder can be deleted however no documents are permanently deleted as they can be recovered by your e-Builder Administrator or Project Administrator.

**Downloading Documents**

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

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

**Moving Documents**

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

1. Click on the name of the folder where the document is stored. (See Viewing Documents above if needed)
2. Select the checkboxes next to the names of the files, and click the **Move** link.
3. A new Internet Explorer window will open that will prompt you to select the folder that the files are to be moved to. The user can choose to move it to a different project by selecting that project from the drop down menu. The documents will retain current permissions unless “Inherit file permissions from destination folder” checkbox is checked.
4. Click on the link of the new folder's name. Click Ok to confirm file move.
Files stored in e-Builder can be copied from one folder to another within the same project or copied to another project. When a file is copied, all of the history that has been recorded on it will start again with the new document.

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

4. A new Internet Explorer window will open that will prompt you to select the folder that the files are to be copied to. The user can choose to move it to a different project by selecting that project from the drop down menu.
5. Click on the link of the new folder's name and click **OK**.

**Checking Out Documents**

The Check Out feature in e-Builder allows users to hold exclusive rights to upload new versions of a document. When a document is checked out, all other users are blocked from uploading a new version of the file yet they maintain rights to view it. The benefit of using this feature is that all users are informed that one user is making updates to the file, so they are prevented from uploading changes to it while that user has it checked out.

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

4. To undo Check Out, click the Properties link beneath the checked out document.

5. Select the Check In option.
6. **Select Browse**, locate saved file, and **select Upload File**.
Sending Documents

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

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

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

4. **For Email:**
   - choose from drop down menu to send files as attachments or links to download (this option is useful for sending large amounts of data)
   - Insert emails in the “To” box by manually typing them or using the “lookup” function
   - Add a subject and description (description is optional)
   - Choose to send native file or pdf (pdf’s do not allow for editing, only viewing)
   - Click Send
5. For Fax:
   - Insert fax numbers manually or use “lookup” function
   - Add a subject and optional message
   - Click Send
6. **For Notify:** (Used to send documents to users within e-BUILDER)
   - Select users from list box on left and use arrows to move between boxes. (Right box represents users that will receive files)
   - Choose to “Show List of Intended Recipients in Email” or add message if desired.
   - Click **Send**
Forms Module

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

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

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

5.  **Select the type of form you wish to create. Workflow Forms appear at top and static forms will appear below (User may need to scroll down to view static forms)**
6. For Workflow Forms:
   - **Fill out the information in the header of the form**
   - **Enter a Subject line for the form**
   - **Select who should receive the form from the Send To drop-down box**
   - **Select who should be copied on the form (if anyone) from the CC: box - you may choose to copy everyone in a given role on a project or an individual**
   - **Select a due date.**
   - **If necessary, you may change the priority of the form. The default priority is Normal.**
   - **Fill out the form’s data fields, the required fields are noted in red**
7. Attach back up documentation if needed by clicking Attached Files tab. An Attach files screen will be displayed. You can attach documents to a form in three ways:

- **Method 1:** Drag and drop files using the same upload procedure as defined in the Documents module. (See Uploading Documents for help)
- **Method 2:** Select ‘Upload and attach file(s) from your computer ‘ and click Browse For Files
- **Method 3:** Select ‘Attach files from the e-BUILDER Document module for the Dan- e-BUILDER Test project’ and click Browse For Files. Choose the Folder and you will see your folder structure for the selected project.
- **Click Attach Selected**
8. Attach Forms by checking appropriate forms and clicking **Attach** (example below does not have any forms to be checked)

9. Once complete, click **Post Form**. If you are not ready to post the form, click **Save**.
10. For Static Forms:

- Fill out the information in the header of the form
- Enter a Subject line for the form
- Select who should be copied on the form (if anyone) from the CC: box - you may choose to copy everyone in a given role on a project or an individual
- If necessary, you may change the priority of the form. The default priority is Normal.
- Fill out the form's data fields, the required fields are noted in red
11. Attach back up documentation if needed. (Process is identical to attaching files to Workflow form above)

12. Attach Forms if needed. (Process is identical to attaching forms to Workflow form above)

13. Once complete, click **Post Form**. If you are not ready to post the form, click **Save**.
Commenting on a Form

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

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

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

4. **When you are done, click the Add Comment button.**
Replying to a Workflow Form

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

1. Go to the Forms tab.
2. Select the Workflow in My Court view from the drop-down list in the middle of the screen.
3. Click the Subject of the form. It will now open in a new window.
4. Click **Reply**. In the dialog that appears, enter any additional comments you wish to make and attach any backup documentation, if necessary.
5. Click **Reply**.

**Requesting External Comment**

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

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

3. Select the method of delivery either email or fax, click **Next**.
4. Enter the recipient e-mail address, a subject line and a date for response. Use the **lookup** link to locate contact information.
5. Click **Email Request**.
6. The recipient will receive an e-mail that contains the name of the form and a link to click on for further information. When they click on the link they are taken to a copy of the form. The recipient clicks the Add Comment button.
Dan Edge Test via e-Builder <bounces@e-builder.net> 11:16 AM (0)

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.

<table>
<thead>
<tr>
<th>Form:</th>
<th>Action Item #3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject:</td>
<td>TEST Action Item</td>
</tr>
</tbody>
</table>

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: 1-888-268-5717 fax: 1-800-576-9322
support@e-Builder.net

Click here to Reply or Forward
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.)

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

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

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

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

2. **Select the form instance to view the form details. The form will open in a new browser window where you can view the main form detail header information. To ensure you can close the form, the Author and Held By fields must both be your name.**

3. **Review the form and tabs for response information to ensure the form was answered correctly.**

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

6. When the form is closed, the due date counter stops and no further updates can be made to the form unless it is reopened.

7. To view forms that are closed, go to the Forms tab and filter on closed forms for a project. Closed forms will be displayed in the filter with the detail shaded. This denotes that the form is closed.

8. To Re-Open a form, select the closed form and click **Re-Open**.
9. The user will be prompted to reset the due date if applicable.

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

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

1. **Click the Forms tab.**

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

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

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

6. **Containing Text** - Key words contained within a form or form numbers.

7. **Where Located** - Where in the form is the "Containing Text" information located. (e.g. anywhere in the form, in the subject only, in the prefix only)

8. *Once you have selected all of your filter criteria, then click the Filter button and your filter results will be returned.*
The e-Builder Processes module (also referred to as Structured Workflow) is a collaborative system that automates business process according to a set of business rules. This module is a set of enhanced features expanded from the e-Builder Forms module.

Initiating a Process

1. Go to the Process tab.

2. Select project you wish to initiate the process for
3. Click **Start Process**.

4. **Select process type**.

5. **Fill in all required fields (as noted in red)**.
6. Attach back up documentation if needed by clicking Attached Files tab. An Attach files screen will be displayed. You can attach documents to a form in three ways:

- **Method 1:** Drag and drop files using the same upload procedure as defined in the Documents module. (See Uploading Documents for help)
- **Method 2:** Select 'Upload and attach file(s) from your computer' and click Browse For Files
- **Method 3:** Select 'Attach files from the e-Builder Document module for the Dan-e-Builder Test project' and click Browse For Files. Choose the Folder and you will see your folder structure for the selected project.

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

11. The workflow will automatically be sent to the next “actor” in the process.

**Responding to a Process**

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

**Processes for**

<table>
<thead>
<tr>
<th>Filter Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type of Process:</strong> Processes in My Court</td>
</tr>
<tr>
<td><strong>Status:</strong> All Statuses</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Process</th>
<th>Subject</th>
<th>Step</th>
<th>In Step Since</th>
<th>Date Due</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>WCD - 1</td>
<td>Test WCD Process</td>
<td>Design Professional Review</td>
<td>07/15/2013</td>
<td></td>
<td>Submitted</td>
</tr>
</tbody>
</table>

4. Update the fields with your response, required fields are noted in red.
5. Click **Save** to store any added information without taking an action.
6. Attach documents, forms, or processes if necessary (See Initiating a Process, above, for more info)
7. Select action from drop down box, click **Take Action**.

---

### Adding a Comment

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

   ![Comment tab](image)

   - **Subject:** Test WCD Process
   - **Status:** Submitted

   ![Comment field](image)

2. **Fill in comment field**

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

Request External Comments

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

Schedule Module

The e-Builder Schedule module allows the project manager and team members to access and update the schedule in real time. This keeps everyone associated with the project up to date with all changes as they happen.
A new project has reached the point where the schedule can be created.

Create the schedule

Enter durations for each task on the schedule

Active the schedule

Save a Baseline

Creating a Schedule

1. Go to the Schedule tab.

2. Select the project you need to create the schedule for.

3. Input required schedule information (if prompted), click Create.

4. Click the Apply Template button and select the appropriate template for the size and scope of your project.
5. Fill in required information (Note: the default is set to add as last activity in schedule but can be altered when appropriate)

Activating the Schedule

1. Select the task(s) to be activated by clicking on the check box next to their sequence number.
2. Click on the Activate button.
3. Click “Activate” to confirm
Saving a Baseline

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

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

Updating Tasks

1. Click on the name of a task.

2. Click on the Update button.
3. **Enter the updated duration, % complete, or other updates to the task.**

4. **Click Save.**

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

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

Creating an Event

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

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

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

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

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

---

Editing or Deleting an Event

1. Select a project from the Go to Project Calendar for drop-down menu.
2. **Click on the link with the event name.**

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

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

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

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

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

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

5. **Click Save.**

### Calendar Views

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

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

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

3. **To view a 30 day ‘look ahead’ of all events across all projects, click on the **Upcoming Events** tab.**
4. To print within any view, click on Print link.

Contact Module

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

Viewing a Contact

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

Adding a Company or Contact

1. Click on the Contacts tab.
2. On the right-side of the screen, click Add Contact or Add Company.

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

5. For a Company:
   o Fill in required fields
   o If company does not have a company number, press Generate button to auto-generate one.
   o Click Save
6. Click Save (If you have more than one entry, click the Save and Add button and you will be able to add another contact or company.)

Importing Multiple Contact or Companies

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

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

- For a Company: Excel sheet must contain Company Name (All other information is optional)
1. Click on the **Contacts** tab at the top of the screen.

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

3. Select **Import Contact**.

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

5. Click **Browse** to navigate to your file.
6. Find Import document and click Open.

7. Click Next.

8. Map the fields in e-Builder to the fields in your import file. (Each drop-down box will display a list of Import File field names that will correspond to the columns in the Excel spreadsheet)
9. **When all the fields are mapped, click Next.** An Import Review screen will be displayed on which you can verify that all the fields are mapped correctly. In the middle of this screen are two tabs: The first is the Preview, and the second is the Exceptions. (If there are exceptions, this means that there is missing information for the company/contact which will need to be corrected in the MS Excel import file.)
10. Once the mappings are verified and exceptions are corrected in the import file, click **Import**.

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

**Report Module**

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

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

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

Creating a Report Folder

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

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

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

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

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

Editing/Deleting a Folder

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

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

3. Click Save.

Creating a New Report

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

1. Click on the Reports tab at the top of the screen.
2. Click on the **Add New Report** button. You will be directed to the Report wizard.

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

4. In Step 2, click on the radio button for the type of report you wish to run. (Descriptions of each type are beneath the pictures) Click **Next**.
5. In Step 3, select the columns to be included in the report by placing a check mark next to the column name. Click Next.

6. In Step 4, select the aggregate functions to be included in the report. Click Next.
7. In Step 5, choose the ordering of the columns by using the Top, Up, Down, and Bottom buttons.

8. If you have chosen a summary or matrix report, select grouping in Step 6 (optional) and click Next.
9. In Step 7, specify filter criteria for the report.

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

**Exporting a Report**

1. Click on the **Reports** tab at the top of the screen.
2. Expand folder to display desired reports and click **Export** to the right of report.

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

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

Editing an Existing Report

1. Click on the **Reports** tab at the top of the screen.
2. Click on **Edit** next to the name of the report.

3. Modify any aspect of the report within the Report Wizard. (See Creating a New Report, above, for more information if necessary)

4. Click the **Save** or **Save As** (to rename) button.

---

Running Reports

1. Click on the **reports** tab at the top of the screen.
2. **Click on the name of the report that you wish to run. The results of the report will be displayed on the screen.**
Dashboard Module

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

Creating a Dashboard

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

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

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

4. **Type a Title for the dashboard.**

5. **Select the Layout Style: Two or Three columns. Select column width: Narrow, Medium, Wide, or Custom.**
6. Select the folder to store the dashboard in.

7. Click the **Save** button.

Dashboard Items

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

To add a dashboard item:

1. **Select the name of the Dashboard.**

2. Click the **Edit** link or the **Click here to configure this dashboard** link.
3. Click the **Add Dashboard Item** for the column in which the dashboard should be displayed.

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

5. For Chart:
   - Select Report, Chart Type, and Sort By (Other fields are optional)
   - Click **Save**
6. **For Table**
   - Select Report and Sort By
   - Click Save
7. For Metric:
   - Select Report, Sort By, Range Numbers & Colors
   - Click Save
8. For Gauge:
   - Select Report, Range Colors, and Cutoff Values
   - Click Save
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.
A project has been set up and you are ready to send out bids.

A new bid must be set up.

Manage Bid Codes

Determining Potential Bidders & Inviting

Award Bidder & Close Bid

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)**

---

**Inviting Bidders/Closing a Bid**

1. *Go to the Bidding tab.*

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

3. *Click Add Bid Package.*

4. *Enter the bid name and description (Description should be brief, information will be attached later)*
5. Select the Bidding Contact, Start Date/Time, Due Date/Time, and Bid Time Zone. 
   ➢ Complete any optional fields as necessary

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

8. Click **Save**.

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

10. To add documents to bid package, go to documents module and upload documents into folder previously selected to house bid documents.
11. Click **Potential Bidders** to add bidders to bid package.

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

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

14. Add a subject and message if needed. **Press Send.**
15. Click on **Invited Bidders** to manage status of invited bidders.

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

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

Potential Bidders gives you the option to see what bidders you can invite, but select what bidders you want to invite.
Once the bid has been awarded, close the bid so that no one else sends in bids or accesses the bid documents.

Responding to Bids

Log-in or Register
Bidder receives an email advising them that they have been invited to bid on a project

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

6. This will automatically notify the person who invited you to bid whether or not you will be bidding on the project.
7. If you have questions relating to the project click the Questions/Responses tab and then click Submit Question button.

8. Fill in appropriate fields and press Save.

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

10. Upload your bid submission by clicking the Browse button.

11. Locate the file on your computer and double click the file name. The file will now appear in the select the file to submit area.

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

13. A message stating that “Your quote has been received” will be displayed. Click Continue.
14. The inviting party will then award the project. All invited bidders will be notified if they are selected (awarded) or not selected.

Awarding a Bid

To award the package to a bidder:

1. Navigate to Invited Bidders.

2. Click the Wrench icon for the bidder to be awarded.
3. Choose to send a message to the winning bidder/other bidders and click Send.

Submittal Module

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

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

Accessing the Submittal Module

The following are the steps to accessing the submittal module:

1. At the home Screen, select the Project you are accessing by using the drop down menu.
2. **On the left side, click the Submittals link.**

---

Creating a Submittal Registry (Importing Submittals)

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

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

From the Submittal Register page:

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

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

3. **Once you select the file, click Next.**

4. **If the columns in your file are the same as the columns in e-Builder, they should automatically map on this page. If not, select the correct file in the drop down list next to each field that should be mapped for import. Once all fields are mapped, click Next.**
5. **Preview the Import.** This screen will allow you to preview one of the lines to be imported to make sure the fields are mapped correctly. If any rows cannot be imported due to invalid data, they would be listed in the exceptions tab. If all rows are importing correctly, click **Import**.

### Adding Items One at a Time

From the Submittal Register page:

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

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

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

Sending to Subcontractor

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

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

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

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

7. If you are sending this message to any external users, you must select a folder that any documents they attach will be stored in. This field is required if external users are selected.

8. Type a message to send to the recipient.

9. Click Send to Sub.

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

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

Dedge Hammer

<table>
<thead>
<tr>
<th>Title</th>
<th>#</th>
<th>Rev #</th>
<th>Status</th>
<th>Category</th>
<th>Package #</th>
<th>Priority</th>
<th>Date Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fire Protection System</td>
<td>1</td>
<td>0</td>
<td>NEW</td>
<td>Product Data</td>
<td>0</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>Fire Protection System</td>
<td>2</td>
<td>0</td>
<td>NEW</td>
<td>Shop Drawing</td>
<td>0</td>
<td>Normal</td>
<td></td>
</tr>
<tr>
<td>Fire Protection System</td>
<td>3</td>
<td>0</td>
<td>NEW</td>
<td>Shop Drawing</td>
<td>0</td>
<td>Normal</td>
<td></td>
</tr>
</tbody>
</table>

Note:

e-Builder Technical Support
phone: 1-888-288-5717 | fax: 1-800-576-8322
support@eBuilder.net
Attaching Documents

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

From the Submittal Register screen:

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

12. Click on the **Add** button.
13. See Uploading Documents (In Documents section) for more information

Submitting to Architect

Creating a Submittal Package

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

From the Submittal Register screen:

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

16. Select if you will be Create a new submittal package or Select existing submittal package, click **Continue**.
17. Enter the following information
   - Submittal Package Name
   - Description
   - Submittal Package #
   - Trade

18. Click **Save**.

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

**Sending the Package for Review**

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

From the Submittal Package screen:

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

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

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

From the Submittal Package Details screen:

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

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

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

From the Submittal Details screen:

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

2. **A popup will appear where you can enter your comments regarding this item.**
3. **Click Save** to save the status and the note.

**Returning the Package to the Contractor**

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

From the Package Details screen:

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

<table>
<thead>
<tr>
<th>Project:</th>
<th>Dodge Hammer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title:</td>
<td>Main Fire Extinguisher System</td>
</tr>
<tr>
<td>Send To:</td>
<td>Den Edge</td>
</tr>
</tbody>
</table>

**Roles**
- Accounting
- Approver
- Architect
- Associate Project Manager
- Bid Manager
- Construction Manager
- Consultant
- Contractor
- Design Professional

**CC External Users Via Email:**

**Select folder for external user to attach files:**

**Lookup**

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

[Select folder]
Completing the Package

Revise and Resubmit

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

From the Package Details screen:

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

Closing Items/Package

For items reviewed by Architect without need for revision, the Contractor can close items if they agree with the response. The Contractor should create revisions for all items that need to be revised before closing out the completed items.

From the Package Details screen:

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

My Setup

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

Home Module

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

Documents

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

- **EXPLAIN IN YOUR OWN WORDS THE DIFFERENCE BETWEEN A WORKFLOW AND STATIC FORM.**
- **WHO CAN CREATE NEW TYPES OF FORMS FOR YOUR e-BUILDER ACCOUNT?**
- **THERE ARE SEVERAL WAYS TO KNOW WHEN A FORM HAS BEEN PLACED IN YOUR COURT TO TAKE ACTION ON. NAME TWO.**
- **HOW CAN YOU TELL WHETHER A FORM FIELD IS MANDATORY OR OPTIONAL TO COMPLETE?**
- **HOW IS ATTACHING BACKUP DOCUMENTATION TO A FORM DIFFERENT IF YOU ARE THE AUTHOR VERSUS IF YOU ARE THE RECIPIENT OF THE FORM?**

Projects

- **HOW DO YOU EDIT A PROJECT?**
- **HOW DO YOU ATTACH A DOCUMENT THAT RESIDES ON YOUR COMPUTER TO A PROJECT YOUR COMPUTER TO A PROJECT?**
- **HOW DO YOU INVITE NEW USERS TO A PROJECT?**
- **HOW DO YOU SEND A MESSAGE TO A PROJECT PARTICIPANT?**
- **WHAT CAN YOU DO IF A PROJECT PARTICIPANT GOES ON VACATION FOR A WEEK?**

Calendar

- **CREATE AN EVENT THAT TAKES PLACE EVERY MONDAY FROM 1:00 PM TO 2:00 PM FOR THE NEXT TWO MONTHS.**
- **CAN YOU CREATE AN EVENT THAT IS ONLY VISIBLE BY THE INVITED ATTENDEES?**
- **IS IT POSSIBLE TO INVITE ATTENDEES WHO ARE NOT e-BUILDER USERS?**
- **YOU NEED TO SEE ALL EVENTS FOR ALL PROJECTS ON AN ACCOUNT THAT WILL TAKE PLACE WITHIN THE NEXT 30 DAYS. HOW WILL YOU DO THIS?**

Contacts

- **WHAT IS THE DIFFERENCE BETWEEN A COMPANY AND A CONTACT?**
- **CAN THERE BE TWO PRIMARY CONTACTS FOR ONE COMPANY?**
- **WHAT WOULD YOU DO IF YOU HAD A LARGE NUMBER OF COMPANIES OR CONTACTS TO ADD? COMPLETE THE STEPS NECESSARY TO ADD MULTIPLE COMPANIES/CONTACTS.**
Reports

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

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

Dashboards

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

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

- **What types of charts are available?**