

e-Builder Highlights

Each month, we'll provide tips and share information on enhancements and training available to help you as you learn and use the system. This month we're excited to announce the formation of a new advisory council that is helping our team evaluate and plan enhancements to the system based on your feedback.

Processes to use now

Processes collect and route information based on defined business rules, track communications and ensure accountability for those with roles involved in the process work path.

Training has been provided on each of these processes, and documentation is located on the e-Builder Wiki (find the link in the Announcement section of the e-Builder homepage). You should be using these processes now.

01.02 New User Request and Assignment

Use this process to request that a user be added to the e-Builder system and assigned to a project.

01.03 Add Resource to a Project

Use to request that a current e-Builder user be added to a project. All users can start the process.

02.01 Team Assignments

This process is automatically spawned as part of the CRSP screening process for academic projects. For all other projects, it is initiated by the e-Builder admin when a project is created in e-Builder.



TIP: To avoid extended delays – after 7 days in the Team Assignment step, the process will be moved to the next step, even if not all the Assignors have assigned team members. If the window for Team Assignment has passed, please use “01.03 Add Resource to a Project” to assign team members.

02.02 Project Definition Form

When a new PD Form is required – this process can be initiated by the Campus Construction (CC) planner, CC planning manager, project manager, R&M manager, or Utilities program manager.

Need help with e-Builder?

We have several options for on-site technical and procedural assistance.

1. Visit the Wiki page: <https://goo.gl/yy9Atr>
2. Ask Bob! e-Builder trainer Bob Brosseau is available to answer your how-to questions. Call or email Bob at 617-715-4238 (x5-4238) or robertbr@mit.edu
3. Our e-Builder Administrator Ying Liu is available to assist with processes. Reach her within e-Builder via an Action Item.

02.03 CRSP Screening Kickoff

This process routes an academic project through an approval system. It is initiated by the CRSP admin, CRSP admin assistant, or the e-Builder admin.

02.04 MOU and Stage 1 Budget

Used to request DLC approval for the initial budget and to engage resources to better define the entire project budget. Generally, this process is spawned from the CRSP Screening Process. However, when necessary, it can be started by the Project Manager or the e-Builder admin.

03.01 Milestone Project Estimate and Budget Request

This process is spawned from the MOU & Stage 1 Budget Request process as well as the PD Form process. Additionally, the Project Manager can start the process for Schematic Design, Design Development, or As-Bid estimates and budget requests as needed.

Processes to use now (continued)

3.02 \$0 Budget Change

This process can be started by the project manager to move project funds without changing the total budget. However, the total project estimate and budget must have been uploaded into e-Builder previously.

03.03 Contingency Request / True-Up Form / Additional Funding Request

This process can be initiated by the project manager to request the use of contingency funds, true-up, or additional project funding. However, the total project estimate and budget must have been uploaded into e-Builder previously.



TIP: Before any of the cost processes (e.g., 03.02 \$0 Budget Change"; 03.03 Contingency Request/True-Up/Additional Funding Request; 04.04 Issue PO/Contract; etc.) can be used on projects with pre-existing estimates and budgets the Project Estimate and Budget Request template must be uploaded into e-Builder with the most recent estimate and budget data. (See more info in the next news item below.)

Project Estimate and Budget Template

Important Information for Project Managers

The Project Estimate and Budget Request template (v.02) has been uploaded into the document folder "02.02 Capital Budget (I)" in all projects. The new template contains corrections as well as additional tabs which can be printed for use in department reviews. It is uploaded into the "3.01 Milestone Project Estimate & Budget Request" process as part of the budget approval.

Project managers may begin using this template at any time to prepare their budget estimates, however it needs to be attached to the following processes:

2.02 Project Definition Form Creation

2.04 MOU and Stage 1 Budget

3.01 Milestone Project Estimate and Budget Request



TIP: use the Edit option to open the worksheet for editing in Excel. When finished, save and use the "Check In" link to place the document back into the folder.

FAQs

Who do I contact for technical support?

If you're not sure how to do something, please contact our trainer, Bob Brosseau, dof-ebuilder-info@mit.edu.

What are your plans for group training?

In the weeks to come, we will offer group sessions. If you have suggestions or want to schedule training for your team, please email dof-ebuilder-info@mit.edu.

Are there reporting capabilities now?

e-Builder reporting capabilities will be available in the near future. In the meantime, reporting continues to be available through PICS, where e-Builder data is loaded daily.

Process release schedule

March 13, 2017

04.00 Bidding

April 2017

04.04 Issue Purchase Order/Contract

04.05 LSW/Exhibit A Request

06.01 Change Order Request

06.02 General Contract Change Order

06.03 Professional Services Agreement

06.06 Pay Requisition and Invoice

06.07 Journal Voucher Request

May 2017

Document Review

Hot Work Permit

Hot Work Permit Daily Notification

Project Closeout Initiation

Project Closeout Requirements

By Fiscal Year End

Reports and Dashboards

Time Tracking Module

Forms