

Check out the release schedule provided in this issue!

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# e-Builder News

Issue 2, December 2017

Dear Robert ,

Welcome to the second issue (my first issue) of our e-Builder newsletter. Each month, I will provide useful e-Builder tips & tricks as well as share information on upcoming enhancements and training sessions available to help you as you learn and use the system.

This month I am excited to share news of three e-Builder modules that are currently being enhanced (more information below) and upcoming training opportunities. Let me know if you have any questions regarding the items covered in this newsletter and any feedback you may have for future newsletters.

Chelsea Cohen  
*Senior Project Manager, e-Builder Implementation*

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## Did you know?

- The "?" on the top righthand side of your screen is able to identify what section of e-Builder you are working within and can provide you with specific quick guidance.

## Need help with e-Builder?

We have several options for on-site technical and procedural

- You can create your own custom Process or Project views that allow you to filter and sort by specific data fields, as well as customize viewable columns in order to view information in ways that work best for you. Please contact Chelsea Cohen for further assistance in creating these custom views.

- Visit the [Wiki page](#).
- Send any questions or comments related to this newsletter to [Chelsea](#).
- Ask the [e-Builder team](#)! We are here to help and are available for desk side assistance, project team training, and general e-Builder support.

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## Project budgets/funding process

The Project Estimate and Budget Request template (v.05.1) has been uploaded into the document folder “02.02 Capital Budget (I)” in all projects. The new template contains corrections that round totals to whole numbers 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. [Instructions for locating, opening, and using the template](#) in e-Builder are located on the Wiki.

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## In the works

released into production for use. Utilizing the templates in e-Builder will allow for the elimination of the current robust excel spreadsheets being used. They will allow for project budgets to be entered and approved directly in e-Builder. Training opportunities will be forthcoming prior to this release.

- The current e-Builder Document Structure is being enhanced per comments from the working review group. The new structure will provide more flexibility to add folders as well as a more intuitive structure for uploading, downloading and sharing files amongst the project team. A document structure guide will be distributed prior to the new Document Structure being applied to new projects.
- All current cost processes are being reviewed for opportunities to streamline them for faster approval times and for less duplication of data entry.
- The Contacts Module in e-Builder is being updated so that all Company information will be available to all e-Builder users. This will include company classifications, qualifications, rate sheets, brochures, insurance, etc. More detailed information on how to access this information and create custom views is available in the e-Builder 101 training or by contacting your e-Builder support team.

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## Useful tips & tricks

The "Request Comment" feature on all processes allows for you to request a comment, or notify users that you have made a comment, from anyone within or outside of e-Builder. This can be used to ask for a clarification (rather than having to send the process back to the start) or to get

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

Attached To (0)

Request Comment Comment

Comment ▾

There are no comments for this process.

Request Comment Comment

Print Cancel

## Upcoming training sessions

I am happy to share that both the November and December e-Builder 101 training sessions were full in attendance. Valuable information was shared with the attendees and I received a lot of great questions and feedback. Training sessions are more than just an opportunity to sit and watch. I provide interactive training sessions in a casual setting that encourages questions and feedback from those attending.

I will be sending out invitations to the training sessions below after the holidays (date/time to follow):

**Bidding** - Learn how to use both the bidding module as well as the bidding process.

**Cost Module** - An opportunity to see the new e-Builder budget templates prior to them going live. I will cover how to use the new budget approval process to enter your budgets for approval as well as how to most efficiently use the cost module to track your project costs, report, and forecast.

**e-Builder 101** - e-Builder navigation, tips/tricks, homepage management, and document management.

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## Planning enhancements with your feedback

Enhancing your experience with e-Builder is a top priority for our team.

Please provide feedback regarding your experience with e-Builder at MIT by going to the User Experience Project and submitting an “MIT e-Builder Feedback” form. Your suggestions and feedback are welcome and will be reviewed and prioritized.

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## Send us your newsletter ideas!

Let us know what tips and information would help you as you learn and use e-Builder and we'll feature them in an upcoming newsletter. [Email our e-builder team.](#)

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