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# e-Builder News

Issue 4, February 2018

Dear Robert ,

This month, on behalf of myself and the e-Builder team, I am excited to share news of process enhancements that are in the works (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*

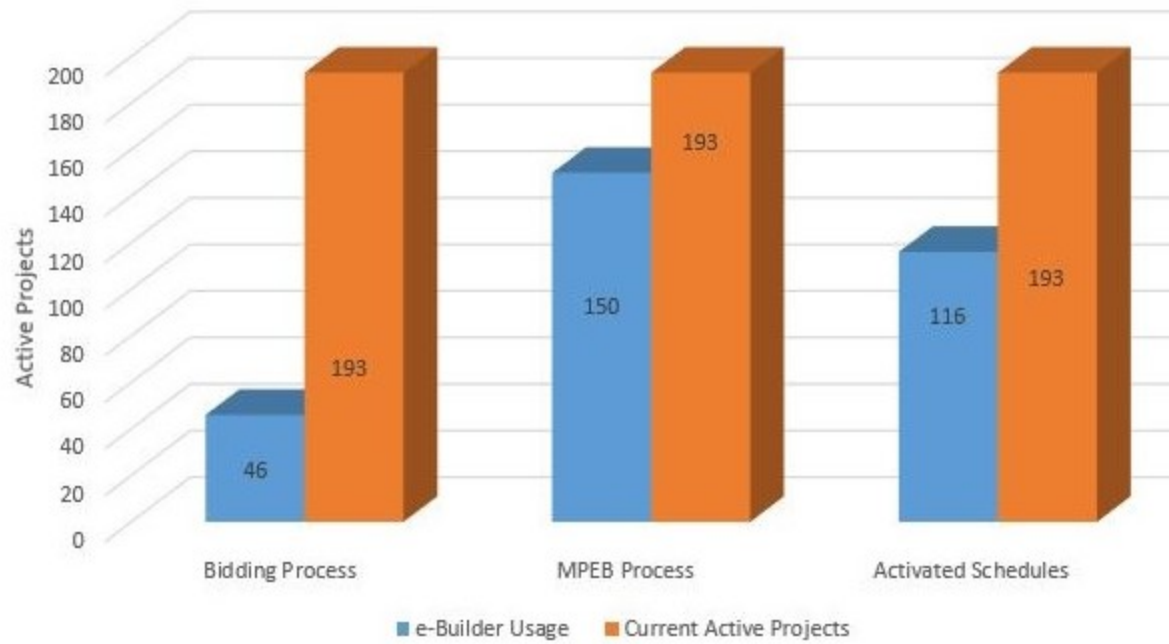
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## From a Director

"Many thanks for sharing all the great feedback on what works well in e-Builder and what could work better. You may have noticed some improvements and enhanced capabilities already implemented with great care by the e-Builder team, as they work on more significant improvements to be rolled out this spring/summer. I encourage you to sign up for one of the training opportunities, or to stop by for a visit with the e-Builder team to let them know how the updates are working for you and to see what is happening on the ground to improve the user experience."

Joe Higgins, PE

## Current e-Builder Usage



## Did you know?

- You can use the e-Builder Calendar module to create events. You can access the calendar by clicking on the calendar link under the announcements section on your e-Builder homepage.

**MIT Department of Facilities**

**Chelsea Cohen** All Projects

**Workflow in your court** Show First ten

Project	Name	Subject	Step	Date Due	Requested Comment
2 - e-B User Experience	Action Item #129	Add dynamic grid to 01.01 process		01.31.2018	
3 & 35 - OVC/OGE - Space Reconfiguration	TA - 1	18118 3 & 35 - OVC/OGE - Space Reconfiguration Study - Initial Team Assignments	Team Assignments - Including PM	02.02.2018 09:22am	✓
7 & 5 - OVC - HQ Office Reconfiguration	TA - 1	18115 7 & 5 - OVC - HQ Office Reconfiguration Study - Initial Team Assignments	Team Assignments - Including PM	02.02.2018 09:24am	✓

**Announcements**

**Team Contacts**  
 If you need support regarding projects, Ying is the lead and can help you. [lyying@mit.edu](mailto:lyying@mit.edu) 4-6176

If you need assistance creating/generating new reports, Jacob can help you. [hs13@mit.edu](mailto:hs13@mit.edu) 2-2984

If you need desk side help or training, Bob can help you. [roberta@mit.edu](mailto:roberta@mit.edu) 5-4238

The e-Builder Help Wiki link: [https://wikis.mit.edu/confluence/wik\\_Bg](https://wikis.mit.edu/confluence/wik_Bg)

**Monday, Feb 26, 2018**

There are no events for today.

Calendar

**Planning** **Forms** **Processes** **Documents** **Calendar** **Contacts** **Bidding** **Cost** **Schedule** **+**

### Calendar

All Calendar Events Edit | Add View All Projects

Month Week Work Week Day Upcoming Events Add Event

< > Today **February 26 - March 02**

	Mon, Feb 26	Tue, Feb 27	Wed, Feb 28	Thu, Mar 01	Fri, Mar 02
all day					

- If a company has submitted a RFQ, you can find the links to the RFQ(s) within the Contacts module in e-Builder. First click on the Contacts Module, then click on the Company tab to search by company name. Once you have found the company, click on the company link. The Company information is shown first, and then below that is a Custom Fields tab. If you scroll to the bottom of the custom fields tab, you will see the newly added links for RFQs which will be shown if they have been received by the company. Please note: you must be in VIEW ONLY mode to get this information.

Company:	AKF GROUP LLC
Country:	USA
(view map) Address:	99 Bedford St.
Suite	2nd Floor
City:	Boston
County:	
State/Province:	MA
Zip/Postal Code:	10036-5601
Primary Contact	information, General

## Type of Service:

RFQ 101 - Building Condition Assessments:	<a href="https://app.e-builder.net/da2/Processes/InstanceDetails.aspx?InstanceID=cf7e4d5f-497d-40df-8880-67ab45d268c1">https://app.e-builder.net/da2/Processes/InstanceDetails.aspx?InstanceID=cf7e4d5f-497d-40df-8880-67ab45d268c1</a>
RFQ 102 - CM Services in support of Building Asmnt:	
RFQ 103 - Building Envelope Assessments:	
RFQ 201 - Architectural Services for Ofc & Clss Rn:	
RFQ 202 - Code Consultant Services:	<a href="https://app.e-builder.net/da2/Processes/InstanceDetails.aspx?InstanceID=c75da30e-4283-42b5-844c-41d65cd59797">https://app.e-builder.net/da2/Processes/InstanceDetails.aspx?InstanceID=c75da30e-4283-42b5-844c-41d65cd59797</a>
RFQ 301 - Geotechnical Engineering and LSP/MCP Ser:	
RFQ 401 - Structural Engineering Services:	
RFQ 501 - Commissioning and Retro-Commissioning Ser:	<a href="https://app.e-builder.net/da2/Processes/InstanceDetails.aspx?InstanceID=15599040-cd87-4b37-bfe2-a1e9dfdba030">https://app.e-builder.net/da2/Processes/InstanceDetails.aspx?InstanceID=15599040-cd87-4b37-bfe2-a1e9dfdba030</a>

**Reminders**

Please activate your schedule(s) in e-Builder. Below is a screenshot of how to do so, but please reach out to the e-Builder team for further assistance.

- Update schedule and make sure you have correct start and finish dates for Design, Procurement Services, and Construction.
- Make sure to select Actions dropdown (on top right) and ACTIVATE your schedule – otherwise it is invisible.
- If you have a partial schedule, just activate selected tasks.



If box has a gray tint (as shown), the task is NOT activated

Task View	Task Name	Duration	Start	Finish	% Complete	Predecessors
	Design	290d	07.21.2017	09.12.2018	0%	
	2 Scoping	6w	09.01.2017	10.12.2017	0%	
	3 SD	4mo	02.01.2018	05.23.2018	0%	
	4 DD	1d	07.21.2017	07.21.2017	0%	
	5 CD	4mo	05.24.2018	09.12.2018	0%	3FS
	6 Procurement Services (Bidding)	2mo	09.18.2017	11.10.2017	0%	
	7 Construction	8mo	07.02.2018	02.08.2019	0%	
	8 Commissioning & Turnover	2mo	12.03.2018	01.25.2019	0%	

### Need help with e-Builder?

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

- 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.

- Program specific e-Builder budget templates have been developed. Once these have been finalized and coded, they will go through our testing process prior to being 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.
  - A new "Budget Approval" process is also being developed to streamline the process in which project budgets gets entered and approved within e-Builder as well as funded.
- 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 specific processes we are currently reviewing are:
  1. "02.04 - MOU & Stage 1 Budget - CRSP (MOUS1)"
  2. "03.01 Milestone Project Estimate & Budget Request (MPEB)"
  3. "04.04 - Issue Purchase Order/Issue Contract (PO)"
  4. "10.01 - Project Manager's Project Update (PMU)."

*Please contact me with any feedback, concerns, or questions regarding your experience with any of these processes.*

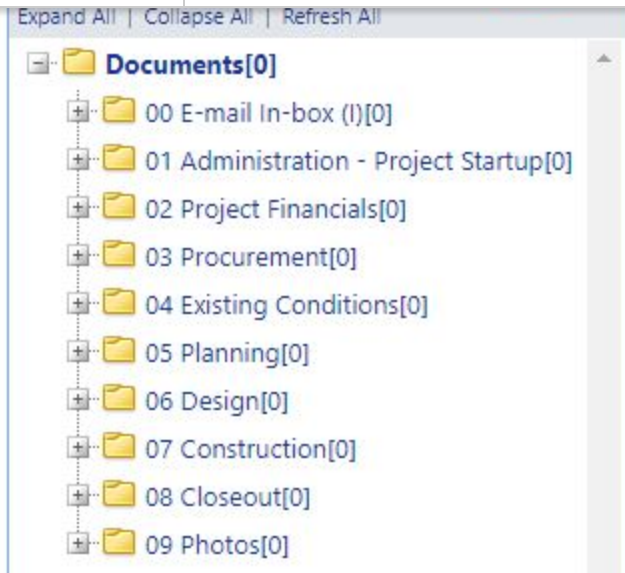
- The Contacts Module in e-Builder is being updated so that all Company information will be available to all e-Builder users. This will include company classifications, qualifications, rate sheets, brochures, insurance, etc. More detailed information on how to access this information and create custom views is available in the e-Builder 101 training or by contacting your e-Builder support team.

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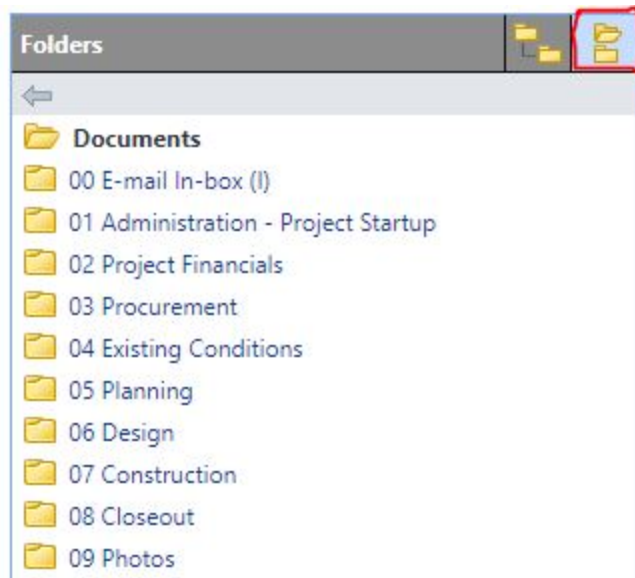
## Useful tips & tricks

There are two ways in which you can view your project document structure; waterfall and collapsed.

In waterfall mode you can see all of the folders expanded and in parentheses the file count within each folder is shown.



In collapsed mode you will only see the master folder level, and the file counts will not be shown.



opportunity to sit and watch. I provide interactive training sessions in a casual setting that encourages questions and feedback from those attending.

### Scheduled Training Sessions

**03/22/2018 1:00-2:30 pm NW23-249 Peaks conference room**

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

**03/06/2018 10:00-11:30 am NW23-249 Peaks conference room**

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

### Future training sessions (date/time to follow):

**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.

**Scheduling** - A comprehensive training session on basic scheduling techniques as well as how to use the scheduling module within e-Builder.

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## Completed Action Items

Below is a list of all action items that were submitted and have since been completed along with a brief description of each.

#53 – Confirmed that PO/Contract process will handle the situation where a PM needs to have a PO for just the cost of Schematic Design but needs to issue a contract for the full scope of services.

#99 – Redesign of True Up Form – Existing form in prod works and guidance was requested from users about format.

#106 – Fixed issues with the General Contract Change Order mail merge template.

#117 – For the PD Form process, the Spawn MPEB step has been moved and now occurs before the Working Committee



#122 - "CRSP F/Y In Cycle?" field added to the Admin Assistant update screen (CRSP Screening Process).

#125 – Update of users permissions for EHS.

#128 – Two changes made to Contacts module (primary contact move and union/non/signatory) and two enhancement requests sent to e-Builder.

#130 – PMU 10.01 Process – changes completed - reviewed and edited and completed again - awaiting additional review.

#131 - Reordered Company Custom Fields: type of service, RFQ vendor, small/large business, debarred, PO box. etc. for Company Details Custom Fields and added instruction for "Is debarred?" field.

#136 - Updating DLC structure and names for Chancellor and Vice Chancellor.

#137 – Notification added to PO Process 04.04.

#138 – Retainage calculation issue resolved.

#141 – Title change in eB for Dean of Student Life.

#142 – MOU Merge and Stage 1 templates reworked.

#144/145 – New CQP forms moved to Test environment.

## 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.

## 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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