



## **e-Builder Administrative Assistance**

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# e-Builder 8.6 Help

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*by e-Builder, Inc.*

## **e-Builder Administrative Assistance**

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# Table of Contents

<b>Part I Administration Tools</b>	<b>15</b>
<b>1 About e-Builder Administrative Roles</b>	<b>15</b>
Add Additional Account Administrators	17
Add Project Administrators	18
Add Users to Roles	19
Add Roles to the Administrator Role	19
<b>2 Automation</b>	<b>20</b>
<b>Scheduled Tasks</b>	<b>20</b>
Subscriptions	27
Report Subscriptions	28
<b>3 API Access</b>	<b>29</b>
<b>About e-Builder oData API</b>	<b>29</b>
Query String Options	31
Response Codes	31
Throttling	31
Paging	33
Supported e-Builder Entities	34
<b>Manage API Access Keys</b>	<b>35</b>
Create New API Keys	35
Enable/Disable API Keys	36
<b>Access the API Consumer</b>	<b>37</b>
Sample API Call Using Microsoft® Excel® Power Query	37
<b>4 Bidding</b>	<b>40</b>
<b>Access Bidding Settings</b>	<b>40</b>
<b>Bidding Custom Fields</b>	<b>40</b>
<b>Color Codes</b>	<b>41</b>
<b>Fax Cover Sheets</b>	<b>42</b>
Create Template from Word® Document	43
Download a Default Template	44
Customize Template with Field Mappings	44
Edit Fax Cover Sheets	46
<b>Bid Document Permissions</b>	<b>47</b>
<b>Managing Bid Scope Templates</b>	<b>47</b>
Add Bid Scope Templates	47
Add Items to Bid Scope Templates	48
Create Bid Scope Sections	49
Add Items to Bid Scope Templates	50
Add Additional Information Records to Templates	50
<b>Bid Scope Templates Page Overview</b>	<b>52</b>
<b>Bidding Options</b>	<b>53</b>
<b>Public Registration Setup</b>	<b>55</b>
<b>Units of Measure</b>	<b>56</b>
<b>5 Calendar</b>	<b>56</b>
<b>Access Calendar Settings</b>	<b>56</b>
<b>Event Custom Fields</b>	<b>57</b>
<b>Event Location Setup</b>	<b>57</b>

<b>Work Week Setup</b> .....	<b>57</b>
<b>Meeting Minutes Setup</b> .....	<b>58</b>
Enable Meeting Minutes.....	58
Set Form Type for Action Items.....	59
Add/Delete Meeting Types.....	59
Add/Delete Meeting Topics.....	60
<b>Mail Merge Templates</b> .....	<b>61</b>
Add New Calendar Templates.....	61
Download Default Calendar Template.....	62
Customize Calendar Template with Field Mappings.....	62
<b>6 Construction Codes</b> .....	<b>64</b>
<b>Import Construction Codes</b> .....	<b>64</b>
<b>Add Construction Codes</b> .....	<b>65</b>
<b>7 Contacts</b> .....	<b>66</b>
<b>Company and Contact Custom Fields</b> .....	<b>66</b>
<b>Import Contacts</b> .....	<b>66</b>
<b>8 Cost</b> .....	<b>69</b>
<b>Access Cost Settings</b> .....	<b>69</b>
<b>Access Cost Settings Page</b> .....	<b>69</b>
<b>Manage Account Codes</b> .....	<b>70</b>
Import Account Codes.....	72
<b>Cost Settings Page Overview</b> .....	<b>73</b>
<b>Reason Codes</b> .....	<b>81</b>
Working with Change Reason Codes.....	82
Manage Change Reason Codes Page Overview.....	83
<b>Commitment Types</b> .....	<b>87</b>
Manage Commitment Types Page Overview.....	87
Working with Commitment Types.....	89
About the Payment Application.....	90
<b>Cost Custom Fields</b> .....	<b>92</b>
About Commitment Item Custom Fields.....	93
Define Commitment Item Custom Fields.....	93
Configure Display Options for Commitment Item Custom Fields.....	94
About Invoice Item Custom Fields.....	96
Define Invoice Item Custom Fields.....	96
Configure Invoice Item Custom Field Layouts.....	97
<b>Cost Templates</b> .....	<b>99</b>
Budget Templates.....	99
Access Budget Template Page.....	100
Working with Budget Templates.....	100
Import Budget Template Line Items.....	102
Add/Edit Budget Template Line Item Formulas.....	103
Budget Template Overview Pages.....	105
Budget Template Page Overview.....	105
Budget Template Details Page Overview.....	106
Add Budget Template Page Overview.....	109
Edit Budget Template Page Overview.....	110
Import Line Items – Field Mappings Page Overview.....	112
Import Line Items – Review Page Overview.....	112
Cash Flow Templates.....	114
Access Cash Flow Templates Page.....	114
Working with Cash Flow Templates.....	114
Cash Flow Template Overview Pages.....	118

Cash Flow Template Page Overview.....	118
Add Cash Flow Template Page Overview.....	119
Funding Templates.....	121
Access the Funding Template Page.....	121
Working with Funding Templates.....	121
<b>Funding .....</b>	<b>123</b>
Funding Settings.....	124
Access Funding Setup Options.....	124
Edit Funding Settings.....	124
Funding Settings Page Overview.....	126
Funding Categories.....	128
Working with Funding Categories.....	128
<b>Cost Summary Layouts .....</b>	<b>130</b>
Access Manage Cost Summary Layouts Page.....	131
Add Cost Summary Layouts.....	131
Color Code Cost Summary Layouts.....	132
Set Cost Summary Threshold Values.....	133
<b>Dynamic Cost Management .....</b>	<b>134</b>
About Dynamic Cost Columns.....	135
About Dynamic Cost Processes.....	136
Add Dynamic Cost Columns.....	138
Configuring Dynamic Cost Processes.....	139
Dynamic Cost Column Details Page Overview.....	140
Invoice Monthly Daily Reports.....	141
<b>Cost Mail Merge Templates .....</b>	<b>142</b>
Customize Template with Field Mappings.....	142
Add/Edit Mail Merge Templates.....	144
Add/Edit Mail Merge Template Page Overview.....	146
<b>Forecasting .....</b>	<b>147</b>
Forecasting Settings Page Overview.....	148
<b>Units of Measure .....</b>	<b>150</b>
<b>9 Documents .....</b>	<b>150</b>
<b>Access Document Settings .....</b>	<b>150</b>
<b>Manage Document Types .....</b>	<b>151</b>
About Document Types.....	151
Add Document Types.....	151
Enable/Disable Document Types.....	152
Delete Document Types.....	152
<b>Manage Document Custom Fields .....</b>	<b>153</b>
About Document Custom Fields.....	153
Add Document Custom Fields.....	153
Associate Custom Fields with Document Types.....	154
<b>Manage Custom Field Dependencies .....</b>	<b>154</b>
About Custom Field Dependencies.....	154
Add Document Custom Field Dependencies.....	157
Edit Custom Field Dependencies.....	158
Delete Custom Field Dependencies.....	158
<b>Manage Document Stamps .....</b>	<b>159</b>
About Document Stamps.....	159
Upload Document Stamps.....	159
Edit Document Stamps.....	160
Delete Document Stamps.....	160
<b>Manage Spam Filter .....</b>	<b>161</b>
About Spam Filter.....	161

Enable/Disable Spam Filter.....	161
<b>Document Settings Page Overviews .....</b>	<b>162</b>
Document Types Page Overview.....	162
Add/Edit Document Type Page Overview.....	163
Document Custom Fields Page Overview.....	164
Reorder Custom Fields Page Overview.....	165
Document Custom Field Dependencies Page Overview.....	166
Edit Custom Field Dependency Page Overview.....	166
Manage Stamps Page Overview.....	167
Add/Edit Stamp Page Overview.....	169
Quarantine Page Overview.....	171
<b>10 Electronic Signatures .....</b>	<b>172</b>
<b>About Electronic Signatures .....</b>	<b>172</b>
<b>eSignature Setup Process Overview .....</b>	<b>174</b>
<b>Purchase DocuSign Account .....</b>	<b>175</b>
<b>Contact e-Builder Support with DocuSign Credentials .....</b>	<b>175</b>
<b>eSignature Workflow Configuration Process Overview .....</b>	<b>175</b>
<b>Individual Configuration Procedures .....</b>	<b>176</b>
Create Roles for Each Set of Signees.....	176
Create File Data Fields for File Upload.....	177
Configure eSignature Data Field Settings.....	178
Optionally, Create Read-Only Layout for Read-Only Documents.....	179
Enable eSignature Step.....	179
Add Automation Step.....	181
<b>eSign Documents .....</b>	<b>182</b>
<b>11 Equipment Management .....</b>	<b>184</b>
<b>About Equipment Management .....</b>	<b>184</b>
<b>Access Equipment Management Settings .....</b>	<b>184</b>
<b>Configure Project for External Equipment Management .....</b>	<b>185</b>
<b>About Equipment and Cost Integration Settings .....</b>	<b>185</b>
Create Budget Line Item Custom Fields.....	186
Create Equipment Item Custom Fields for Cost Integration.....	187
Establish Equipment and Budget Item Association.....	187
<b>Define Role-Based Permissions .....</b>	<b>188</b>
<b>Add Equipment Item Custom Fields .....</b>	<b>189</b>
<b>Equipment Management Page Overviews .....</b>	<b>189</b>
Equipment Item Custom Fields Page Overview.....	189
Equipment Item Mapping Page Overview.....	192
<b>12 Forms .....</b>	<b>192</b>
<b>Manage Forms .....</b>	<b>194</b>
Access Forms Settings.....	194
Access Manage Form Types Page.....	195
Create New Form Types.....	195
Manage Form Properties.....	196
Manage Form Sections.....	197
Manage Form Fields.....	198
Manage Form Permissions.....	200
Copy Form Types.....	200
Delete Form Types.....	201
Add Form Type Custom Fields.....	201
Manage Form Mail Merge Templates.....	202
Download Default Forms Mail Merge Template.....	203
Access e-Builder Field Mappings.....	204

Customize Form Template with Field Mappings.....	205
Add Form Mail Merge Templates to e-Builder.....	206
Edit Forms Mail Merge Templates.....	207
<b>Forms Settings Page Overviews .....</b>	<b>208</b>
Manage Form Types Page Overview.....	208
Form Type Properties Page Overview.....	209
Add/Edit Form Sections Page Overview.....	214
Add/Edit Form Fields Page Overview.....	215
Preview Form Type Page Overview.....	217
Form Type Permissions Page Overview.....	217
Copy Form Type Page Overview.....	219
Form Type Custom Fields Page Overview.....	220
<b>13 Global Custom Fields .....</b>	<b>221</b>
About Global Custom Fields .....	221
Access Global Custom Fields Page .....	221
Set Up Document Custom Field Import File .....	221
Import Document Custom Fields .....	223
Add Global Custom Fields .....	224
About Custom Field Dependencies .....	225
Add Field Dependencies .....	228
Download Custom Field Dependency Template .....	228
Export Custom Field Dependencies .....	230
Import Custom Field Dependencies .....	231
Add/Edit Custom Field Page Overview .....	233
Add Custom Field Dependency Page Overview .....	235
Add/Edit Custom Field Dependency Page Overview .....	236
<b>14 Individual License Manager .....</b>	<b>238</b>
Add Licensed Users .....	238
Send Message to Users .....	238
View License History .....	239
Renew e-Builder License .....	239
Individually Licensed User Registration Guide .....	240
<b>15 Mail Merge Templates .....</b>	<b>241</b>
Customize Template with Field Mappings .....	242
<b>16 Plan Room .....</b>	<b>245</b>
About the Plan Room .....	245
Plan Room Benefits .....	246
When to Use the Plan Room .....	247
Access Documents Settings .....	248
Plan Room Setup .....	249
Define Document Custom Fields .....	249
About Document Types .....	250
Associate Custom Fields with Document Types .....	250
Customize Plan Room Settings .....	251
Plan Room Settings Page Overview .....	253
Define Project Access .....	256
<b>Project Document Controller .....</b>	<b>257</b>
About Plan Room Enabling Documents.....	258
Plan Room Enable Documents.....	258
About Defining Document Relationships.....	259
Define Document Relationships.....	260
About Validating Related Files.....	261
Validate Related Files.....	261



About Exceptions.....	262
<b>17 Planning .....</b>	<b>262</b>
<b>Access Planning Settings .....</b>	<b>262</b>
<b>Capital Plans Settings .....</b>	<b>262</b>
<b>Escalations .....</b>	<b>263</b>
How Escalations Work.....	263
Set Escalations.....	264
<b>Scenario Templates .....</b>	<b>264</b>
<b>Create Project and Scenario Views .....</b>	<b>265</b>
Create Project Views.....	265
Create Scenario Views.....	265
<b>Units of Measure .....</b>	<b>266</b>
<b>18 Processes .....</b>	<b>267</b>
<b>Manage Processes .....</b>	<b>267</b>
<b>Access Process Settings .....</b>	<b>268</b>
<b>About Cost Processes .....</b>	<b>268</b>
<b>Properties Tab .....</b>	<b>269</b>
Properties Tab Overview.....	269
Create New Processes.....	275
Edit Existing Processes.....	276
Activate a Process.....	276
Delete Processes/Instances.....	277
<b>Data Tab .....</b>	<b>278</b>
Access Data Tab.....	279
Data Tab Overview.....	279
About Module Integration.....	283
Set up Cost Processes.....	285
Add Process Data Fields.....	285
Edit Process Data Fields.....	287
Add Process Data Field Dependencies.....	287
Reorder Data Fields.....	288
About Lookup Processes.....	288
Set up Lookup Processes.....	289
<b>Page Layouts Tab .....</b>	<b>291</b>
Access Page Layouts Tab.....	291
Layout Properties Page Overview.....	292
Add Page Layouts.....	295
Create Sections.....	296
<b>Workflow Tab .....</b>	<b>297</b>
Access Workflows Tab.....	298
Access Workflow Designer.....	298
Access Step Properties.....	299
About Spawned Processes.....	299
About External Workflow Processes.....	300
Creating the Workflow.....	302
Add New Workflows.....	302
Design Workflows.....	303
Edit Steps.....	303
Add Actions.....	304
Add Data Field Assignments.....	304
Add Escalation Rules.....	305
Connect Steps in the Workflow.....	306
Spawn Processes.....	307
Complete Workflows.....	308

Workflow Overview Pages.....	309
Workflow Properties Page Overview.....	309
Add New/Edit Workflow Page Overview.....	315
Workflow Designer Icons Overview.....	319
Edit Step Page Overview.....	323
Add Action Page Overview.....	327
Add Assignment Page Overview.....	331
Add Escalation Rule Page Overview.....	337
Edit Conditional Branch Page Overview.....	339
Add/Edit Connector Page Overview.....	344
Spawn Edit Step Page Overview.....	346
Spawn Edit Step.....	348
Edit Automation Step Page Overview.....	351
<b>Process Custom Fields .....</b>	<b>353</b>
<b>Processes Mail Merge Templates .....</b>	<b>354</b>
<b>19 Projects .....</b>	<b>356</b>
<b>Managing Project Settings .....</b>	<b>356</b>
Access Project Settings.....	356
About Project Settings.....	356
Access Project List Page.....	357
Setting Up New Projects.....	358
About Project Imports.....	358
Import Projects.....	361
Add New Projects.....	362
Apply Project Templates .....	362
Complete Project Settings.....	363
Create Project Number Custom Field.....	364
Add Project Custom Fields.....	365
Add Project Web Links.....	365
Edit Project Details.....	366
Delete Projects.....	367
About Project Statuses.....	367
Add New Project Statuses.....	368
Edit Existing Project Statuses .....	368
Delete Project Statuses.....	369
<b>Project Settings Page Overviews .....</b>	<b>369</b>
Project List Page Overview .....	369
Project Settings Page Overview.....	372
Add/Edit Projects Page Overview.....	373
Manage Project Status Options Page Overview.....	377
Project Web Links Page Overview.....	378
Add/Edit Project Web Links Page Overview .....	379
Import Projects Page Overview.....	380
<b>20 Project Level Roles .....</b>	<b>383</b>
<b>About Project Level Roles .....</b>	<b>383</b>
<b>Managing Project Level Roles .....</b>	<b>384</b>
Add New Users to Project Roles.....	384
Transition Existing Users from Account to Project Roles.....	386
Working with Project Role Templates.....	388
Download Project Role Template.....	388
Import Project Role Templates.....	389
Apply Project Role Templates.....	390
Create Project Role Templates within e-Builder.....	391
Edit Project Role Templates.....	391

Export/Print Project Role Template.....	392
Managing Project Role Associations.....	393
View User and Role Associations Grouped by Role.....	393
View User and Role Associations Grouped by User.....	394
Edit Project Role Associations.....	395
Supplemental Project Level Role Tasks.....	396
Add New Account Roles.....	396
Add Users to Account Roles.....	397
Add Users to Projects.....	397
Add User to Project Level Role.....	398
Remove Users from Account Level Roles.....	398
<b>21 Settings .....</b>	<b>399</b>
<b>Account Settings .....</b>	<b>399</b>
<b>Announcements .....</b>	<b>400</b>
<b>Color Scheme .....</b>	<b>401</b>
<b>Company Logo .....</b>	<b>405</b>
<b>Export Header and Footer .....</b>	<b>407</b>
<b>Fiscal Year .....</b>	<b>409</b>
<b>Login Agreements .....</b>	<b>410</b>
<b>Notification Settings .....</b>	<b>413</b>
<b>Password Policies .....</b>	<b>414</b>
<b>22 Schedule .....</b>	<b>416</b>
<b>About the Schedule Module .....</b>	<b>416</b>
<b>Access Schedule Settings .....</b>	<b>417</b>
<b>Managing Master Processes and Master Tasks .....</b>	<b>417</b>
About Master Processes and Master Tasks.....	417
Add Master Processes.....	418
Add Master Tasks to Master Processes.....	419
Edit Master Processes.....	420
Delete Master Processes.....	421
Edit Master Tasks.....	421
Delete Master Tasks.....	422
<b>Managing Calendar Exceptions .....</b>	<b>422</b>
About Calendar Exceptions.....	422
Add Calendar Exceptions.....	422
Delete Calendar Exceptions.....	423
<b>Managing Schedule Custom Fields .....</b>	<b>423</b>
Add Schedule Custom Fields.....	423
Add Schedule Template Custom Fields.....	424
Add Task Custom Fields.....	424
<b>Managing Schedule Options .....</b>	<b>425</b>
Edit Schedule Options.....	425
<b>Managing Schedule Templates .....</b>	<b>426</b>
About Schedule Templates.....	426
Add Schedule Templates.....	426
Copy Schedule Templates.....	427
Edit Schedule Template Details.....	427
Delete Schedule Templates.....	428
About Schedule Template Import Fields.....	429
Update Schedule Templates via Import.....	430
Update Schedule Templates Manually.....	431
<b>Schedule Settings Page Overviews .....</b>	<b>431</b>
Master Processes Page Overview.....	431
Add/Edit Master Process Page Overview.....	432

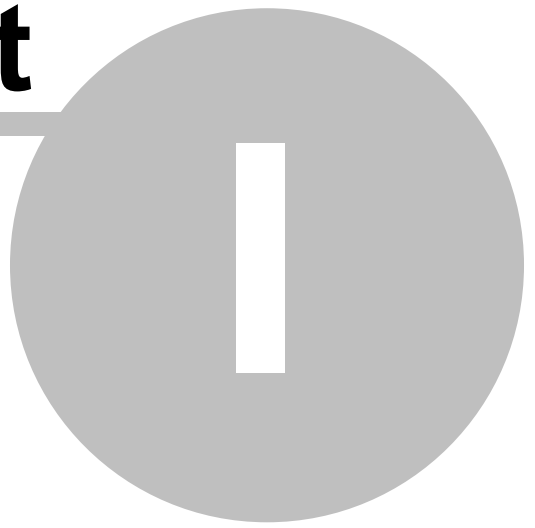
View Master Process Page Overview.....	433
Master Task Page Overview.....	434
Add/Edit Master Task Page Overview.....	435
Calendar Exceptions Page Overview.....	437
Schedule Custom Fields Page Overview.....	437
Schedule Options Page Overview.....	438
Schedule Templates Page Overview.....	439
Schedule Template Details Page Overview.....	440
<b>23 Submittals .....</b>	<b>444</b>
<b>Access Submittal Settings .....</b>	<b>444</b>
<b>Access Submittal Register Page .....</b>	<b>444</b>
<b>About the 'Hide Comments and Attachments' Feature .....</b>	<b>445</b>
<b>Managing Submittal Settings .....</b>	<b>447</b>
Manage Submittal Permissions.....	447
Allow Editing of System-Generated Dates.....	448
Add New Submittal Statuses.....	448
Enable Private Comments.....	449
Add Submittal Item or Submittal Package Custom Fields.....	449
Submittal Status Options.....	450
About Submittal Status Options.....	450
Add New Submittal Statuses.....	451
Edit Existing Submittal Statuses.....	451
Delete Existing Submittal Statuses.....	451
Use Default Submittal Statuses.....	451
Manage Package Statuses.....	452
Submittal Categories.....	453
About Submittal Categories.....	453
Add New Submittal Categories.....	453
Edit Existing Submittal Categories.....	453
Delete Existing Submittal Categories.....	454
Use Default Submittal Categories.....	454
Submittal Package Layouts.....	454
About Submittal Package Layouts.....	454
Add Submittal Package Layouts.....	455
Delete Submittal Package Layouts.....	455
Color Code Submittal Layout Columns.....	456
Set Threshold Values.....	456
Submittal Mail Merge Templates.....	458
Add Submittal Mail Merge Templates.....	458
Edit Submittal Mail Merge Templates.....	458
<b>Submittal Settings Page Overview .....</b>	<b>459</b>
Submittal Settings Page Overview.....	459
Submittal Package Page Overview.....	460
Submittal Register Options Page Overview.....	461
Private Comments Page Overview.....	465
Manage Submittal Package Layout Page Overview.....	465
Submittal Mail Merge Templates Page Overview.....	466
<b>24 Users .....</b>	<b>467</b>
<b>About Managing Users .....</b>	<b>467</b>
<b>Access Users Settings .....</b>	<b>468</b>
<b>Access Manage Users Page .....</b>	<b>468</b>
<b>Account Role Management .....</b>	<b>468</b>
<b>Manage Users .....</b>	<b>469</b>
Run User Adoption Report.....	469

Add Existing Users.....	470
Add New Users to Account.....	471
Edit User Details.....	472
Add User Custom Fields.....	472
Add Users to Project Roles.....	473
Copy Users.....	474
Email Users.....	475
Reassign Work - Users.....	475
Remove Users from Account.....	476
Import Users.....	477
<b>Manage Roles .....</b>	<b>479</b>
Add New Account Roles.....	479
Add Users to Account Roles.....	479
Remove Users from Account Roles.....	480
<b>Users Page Overviews .....</b>	<b>481</b>
Manage Users Page Overview.....	481
User Details Page Overview.....	483
Add/Edit User Page Overview.....	486
Manage Permissions Page Overview.....	489
Permissions by User Page Overview.....	498
User Adoption Report Page Overview.....	503
Manage Roles Page Overview.....	504
View Account Role Page Overview.....	506
Add/Edit Account Role Page Overview.....	508
Add Users to Role Page Overview.....	508
Who's Online Page Overview.....	509
<b>25 Views .....</b>	<b>510</b>
<b>About Setting Up Views .....</b>	<b>510</b>
<b>Access View Settings .....</b>	<b>511</b>
<b>Create Views for Team Members .....</b>	<b>511</b>
<b>Manage Views Page Overview .....</b>	<b>513</b>
<b>Add/Edit Views Page Overview (Admin) .....</b>	<b>514</b>

**Part II Printable User/Administrator Guides (PDFs)**

**519**

**Part**



# 1 Administration Tools

## 1.1 About e-Builder Administrative Roles

There are three kinds of administrative roles in e-Builder: Account Administrator, Project Administrator, and the 'Administrator Role'. Account and project administrators have fixed sets of rights. User roles that are flagged as an 'Administrator Role' can be granted additional permissions. A description of each is provided below:

- [Account Administrators](#)
- [Project Administrators](#)
- [Overview of 'Administrator Role' Settings](#)

### Account Administrators

Typically, at least one account administrator is identified during the implementation process. The account administrator has full access to Administration Tools in the Setup, which allows them to complete configuration changes to the account and manage the permissions of other users. Account admins can add, act on, and modify items throughout the entire account whether they created it or not.

As an account administrator, you are responsible for all account activities from who has access to what project(s) and how the overall account settings are configured for each module. Any change to the account will be coordinated through this user role.

The following tasks are typically the responsibility of the Account Administrator.

- Create and manage users and their access
  - Manage account level settings (e.g. Login agreements, password security, announcement)
  - Create and manage all form types
  - Create and manage account level reports and views
  - Create and manage all schedule configuration (e.g. Templates, master processes, master tasks)
  - Create and manage all cost configuration (e.g. Templates, account codes, change types)
-


Related Topics:

- [Add Additional Account Administrators](#)

## Project Administrators

Project administrators can add existing users to the projects they administer, and manage these user's permissions. They also have the ability to add, act on, and modify items throughout their project(s) as if they were the creator and approver. These items include, but are not limited to the following:

- Forms and form instances
- Processes and process instances
- Documents
- Cost items
- Schedules
- Meeting items
- Bid packages
- Planning scenarios
- Submittals

 **Note:** The project administrator's permissions can be extended if they are added to the 'Administrator Role'; for more information, see [Overview of Administrator Role Settings](#).

Related Topics:

- [Add Project Administrators](#)

## Overview of Administrator Role Settings

The rights of users can be increased if you flag the role that they are a member of to be an 'Administrator Role'. On the [Manage Permissions](#) page, the 'Administrator Roles' appear in red. You can then grant these roles additional permissions. So essentially, the Administrator Role setting merely makes it possible to grant these roles additional permissions. This setting can be enabled/disabled at any time.

The additional permissions that you can give to the 'Administrator Role' are as follows:

---



- **Manage Users:** Allow users to add/edit users for the projects they are a member of.
- **Manage Memberships:** Allow users to add/edit projects and users for the projects they are a member of.
- **Manage Processes:** Allow users to add/edit processes and workflows of the projects they are a member of.
- **Manage Workflows:** Allow users to modify process instances on the projects they are a member of, such as overriding a workflow and delegating process instances.
- **Manage Cost Templates:** Allow users to add/edit the budget, cash flow, and forecast templates of the projects they are a member of.
- **Manage Schedule Templates:** Allow users to add/edit schedule templates of the projects they are a member of.
- **Manage Forms:** Allow users to add/edit forms for the projects they are a member of.
- **Manage Planning Templates:** Allow users to add/edit planning templates of the projects they are a member of.

Related Topics:


- [Add Users to Roles](#)
- [Add Roles to the Administrator Role](#)

### 1.1.1 Add Additional Account Administrators

Account Administrators have the ability to add additional account administrators. It is important to keep the Account Administrator role as limited as possible to ensure the security of your projects. While there is no limit to the number of account admins you can add, most organizations typically have only 2-3 account admin roles.

To add an account administrator:

1. Go to the 'Account Admin [Your Organization's Name]' project.

 **Note:** An Account Admin project is created for each organization during implementation. It's strongly recommended that the name of this project is never changed.

2. In the Project Menu, click **Details**.
3. Click **Project Participants**. The Project Participants page displays.
4. In the **Groups** section, click **Administrators**.
5. Click **Manage this Group**. The Manage User dialog box displays.
6. To add an existing user, go to step 7.  
Or  
To add a new user,
  - a. Click **Add New User**. The Add New User dialog box displays.
  - b. Complete the required fields and click **Save**.
7. Filter for the user, and then add them to the **Administrators** column.

Related Topics:

- [About e-Builder Administrative Roles](#)

### 1.1.2 Add Project Administrators

Only account administrators or users with 'add project' permissions can add project administrators to an account. See [About e-Builder Administrative Roles](#) for more information.

To add a project administrator:

1. Select the project you want to add the project administrator to.
  2. In the Project Menu, click **Details**.
  3. Click **Project Participants**. The Project Participants page displays.
  4. In the **Groups** section, click **Administrators**.
  5. Click **Manage this Group**. The Manage User dialog box displays.
  6. To add an existing user, go to step 7.  
Or  
To add a new user,
    - a. Click **Add New User**. The Add New User dialog box displays.
    - b. Complete the required fields and click **Save**.
-

7. Filter for the user, and then add them to the **Administrators** column.

### 1.1.3 Add Users to Roles

Users that can perform this task:

- [Account Administrators](#)
- [‘Administrator Role’](#) Users – only if they have ‘Manage User’ permissions

To add a user to a role:

1. Click **Setup**.
2. Click **Users**.
3. Click **Manage Roles**. The Manage Roles page displays.
4. Select the role name you want to add users to. The View Role page displays.
5. Click **Add User to Role**.
6. Select the check box next to the user’s name.
7. Click **Add User**.


### 1.1.4 Add Roles to the Administrator Role

Only account administrators can add roles to the ‘Administrator Role’. For more information, see [Overview of ‘Administrator Role’ Settings](#).

**Important:** Before you add a role to the Administrator Role, ensure members of the role are only those users that you want to have ‘Administrator Role’ access.

To add a role to the Administrator Role:

1. Click **Setup**.
2. Click **Users**.
3. Click **Manage Roles**. The Manage Roles page displays.
4. Click the **Edit** link of the role you want to modify. The Edit Role page displays.
5. In the ‘Is Administrator Role?’ field, select **Yes**.
6. Click **Save**.

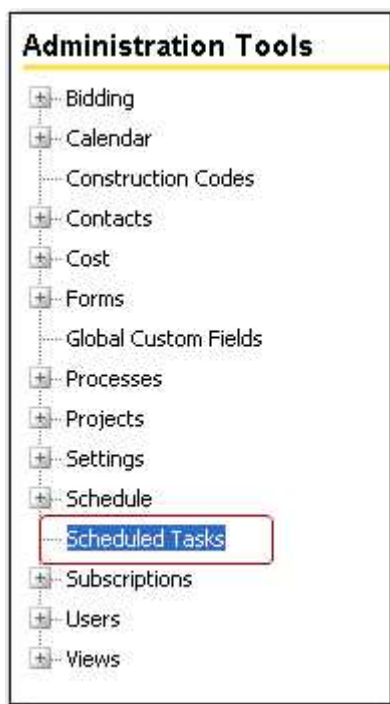
 **Note:** Individual users cannot be added to the ‘Administrator Role’; only an established account role can. Therefore, if you want to place specific users in the

Administrator Role, ensure that they are first part of the account role. For instructions on adding users to a role, see Add Users to Roles.

## 1.2 Automation

### 1.2.1 Scheduled Tasks

The Scheduled Tasks feature shows you a list of your Scheduled Task Subscriptions, the frequency with which the tasks run, and the status (Success/Fail) of the last time the task was run. To view the Schedule Tasks screen, click My Setup > Administration Tools > Scheduled Tasks.



The screen below, the first task, shows that a task named Audit Inventory Process (item 2) is run every day at 4:30 PM (item 3). The last time it was to run, it failed (item 6). It also shows the next time it is to run (item 4).

Scheduled Task Subscriptions						
Scheduled Task Subscriptions						7
1	2	3	4	5	6	Add Scheduled Task
	Name	Schedule	Next Run Time	Last Run Time	Last Result Status	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Disable</a>	Audit Inventory Process	Every Day at 4:30 PM	05.31.2009 04:30 PM	05.30.2009 04:30 PM	Failed	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Disable</a>	Enable User Logins	Once on 05.29.2009 4:30 PM	05.29.2009 04:30 PM	05.29.2009 05:16 PM	Failed	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Disable</a>	Retrieve Web Processes and Send to Server A	Once on 05.29.2009 5:30 PM	05.29.2009 05:30 PM	05.29.2009 05:30 PM	Failed	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Disable</a>	Write Error Messages to Log	Every Month on day 1 at 5:30 PM	11.22.2009 05:30 PM	Never	N/A	
						Add Scheduled Task

To change an existing task, delete a task, or disable a task, click on the hyperlinks under item 1.

## How Do I Add a Scheduled Task?

To Add a Scheduled Task, follow these steps:

1. From the Scheduled Task screen, click Add Scheduled Task (item 7 above.) The Add Scheduled Task screen will be displayed:

**Add Scheduled Task**

**Add Scheduled Task** Save Cancel

Name:

Run As User:  Lookup Clear

Starting Date and Time: 05.30.2009 10:00pm

Repeats:  One Time  Daily  Weekly  Monthly

Script:

2. Step 1: Select a task to schedule. The existing task name will be highlighted.
3. Select the output type.
4. Enter the script
5. Press the Next button to continue.
6. Enter the name, the user name it is to run under, the starting date and time, the frequency with which it will repeat and the script.
  - a) You may enter the user by typing it in, or you may click Lookup.
  - b) If you click Lookup, a secondary browser window will open displaying a filter allowing you to search for valid users. Example:

**Lookup** (Select users to add below)

**Filter Users** Filter

First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Username:	<input type="text"/>	Company:	<input type="text"/>
User Custom Fields:	Select a user custom field <input type="text"/>		
Contact Custom Fields:	Select a contact custom field <input type="text"/>		

- c) Enter search parameters and click Filter. A window similar to this one will be displayed on which you can select the user the scheduled task is to run under:

**Lookup** (Select users to add below)

**Filter Users**

First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Username:	<input type="text"/>	Company:	<input type="text"/>
User Custom Fields:	Select a user custom field <input type="text"/>		
Contact Custom Fields:	Select a contact custom field <input type="text"/>		

**Insert Selected**

	First Name	Last Name	User Name	Company Name	Email
<input type="checkbox"/>	Bobby	Abreu	babreu	Acme Industries	ebuilderqa@n
<input type="checkbox"/>	Ally	Admin	Ally Admin	Acme Industries	dcalia@e-buil
<input type="checkbox"/>	Ally	Admin	Ally.Admin	e-Builder, Inc.	jffood@e-buil
<input type="checkbox"/>	Tunc	Altinbas	taltinbas	eb	taltinbas@e-b
<input type="checkbox"/>	Candace	Amirault	candace.amirault	e-Builder, Inc.	camirault@e-b
<input type="checkbox"/>	Marlon	Anderson	manderson	New York Mets	ebuilderqa@n
<input type="checkbox"/>	Jon	Antevy	jantevy	e-Builder, Inc.	jantevy@e-bui

- c) Select the user and click Insert Selected User. The previous screen will be displayed.

7. When you click one of the frequency radio buttons ('Once', 'Daily', etc.) the screen will expand with additional options, allowing you to enter additional options. The options will vary depending on the selection made, as follows:

Daily:

Repeats:	Repeats every <input type="text"/> day(s)
	Starts: <input type="text" value="05.04.2009"/>
	Ends: <input checked="" type="radio"/> Never
	<input type="radio"/> Until <input type="text"/> 

Weekly:


Repeats:	Repeats every <input type="text"/> week(s)
	Repeats on: <input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
	Starts: <input type="text" value="05.04.2009"/>
	Ends: <input checked="" type="radio"/> Never
<input type="radio"/> Until <input type="text"/> 	

Monthly:

Repeats:	Repeats every <input type="text"/> month(s)
	Repeats by: <input checked="" type="radio"/> Day <input type="text" value="1"/> of the month
	<input type="radio"/> The <input type="text" value="first"/> <input type="text" value="Monday"/> of the month
	Starts: <input type="text" value="05.04.2009"/>
Ends: <input checked="" type="radio"/> Never	
<input type="radio"/> Until <input type="text"/> 	



8. e-Builder provides you with a high degree of flexibility and precision with scheduling the task. You can update the date and time, as well as the days of the week. To set the task for once a week, type 1 in the Every \_\_\_ week(s) area; for every every two weeks, type 2 and so on.
9. When all changes are made press the Save button. The Scheduled Task screen will be displayed with the new task listed in the grid below.

 Note: If your time zone is not displayed correctly, you can reset it at My Setup > Preferences > Notification Settings.

## How Do I Delete a Scheduled Task?

To delete a scheduled task, navigate to the Scheduled Tasks screen.

Scheduled Task Subscriptions						
Scheduled Task Subscriptions						7
1	2	3	4	5	6	Add Scheduled Task
	Name	Schedule	Next Run Time	Last Run Time	Last Result Status	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Disable</a>	Audit Inventory Process	Every Day at 4:30 PM	05.31.2009 04:30 PM	05.30.2009 04:30 PM	Failed	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Disable</a>	Enable User Logins	Once on 05.29.2009 4:30 PM	05.29.2009 04:30 PM	05.29.2009 05:16 PM	Failed	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Disable</a>	Retrieve Web Processes and Send to Server A	Once on 05.29.2009 5:30 PM	05.29.2009 05:30 PM	05.29.2009 05:30 PM	Failed	
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Disable</a>	Write Error Messages to Log	Every Month on day 1 at 5:30 PM	11.22.2009 05:30 PM	Never	N/A	
						Add Scheduled Task

Click Delete (item 1). e-Builder will display a confirmation dialog. Click Yes. The task will be deleted.

**Warning:** Exercise caution in deleting Scheduled Tasks. Once a task is deleted it is no longer recoverable.

## How Do I Disable a Scheduled Task?

Scheduled tasks can be temporarily disabled in e-Builder. This is a helpful feature; perhaps a user is going on vacation and needs to suspend a task for a time. To suspend a task temporarily first navigate to the Scheduled Tasks screen in e-Builder:

Scheduled Task Subscriptions						
Scheduled Task Subscriptions						7
1	2	3	4	5	6	
	Name	Schedule	Next Run Time	Last Run Time	Last Result Status	
Edit   Delete   <b>Disable</b>	Audit Inventory Process	Every Day at 4:30 PM	05.31.2009 04:30 PM	05.30.2009 04:30 PM	Failed	
Edit   Delete   <b>Disable</b>	Enable User Logins	Once on 05.29.2009 4:30 PM	05.29.2009 04:30 PM	05.29.2009 05:16 PM	Failed	
Edit   Delete   <b>Disable</b>	Retrieve Web Processes and Send to Server A	Once on 05.29.2009 5:30 PM	05.29.2009 05:30 PM	05.29.2009 05:30 PM	Failed	
Edit   Delete   <b>Disable</b>	Write Error Messages to Log	Every Month on day 1 at 5:30 PM	11.22.2009 05:30 PM	Never	N/A	

Click Disable (Item 1 above). The task that you disabled will remain in the list, but the hyperlink 'Disable' will become 'Enable, and the Schedule column for the task will display the data 'Disabled.'

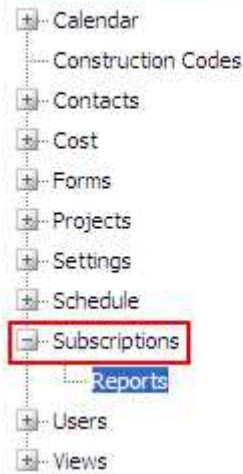
	Name	Schedule	N
Edit   Delete   <b>Enable</b>	Audit Inventory Process	Disabled	N

When you wish to enable the task again, simply click Enable.

### 1.2.1.1 Subscriptions

Subscriptions provide the capability to schedule the automatic distribution on a report to specific user. To access Subscriptions, go to Administration Tools - Subscriptions - Reports.

#### Administration Tools



To setup a subscription is exactly the same process as setting a personal subscription in [My Setup](#). The only difference as an e-Builder Administrator is that you can setup a report subscription for another user.

### 1.2.1.2 Report Subscriptions

To setup a report subscription you need to select the user you are going to subscribe to a report. There are two drop-down selection fields to help minimize the amount of scrolling looking for a specific users name. The first drop-down selection is to select the role that the user is in. When this is selected, the second drop-down selection will only show users within that role on the account.

Subscriptions - Reports

Only Show Users In Role: All Users

Please select a user...

Please select a user from above list. You can narrow down the user list by first selecting a role.

The scheduled reports for this user will show. To schedule a new report, press the Add Scheduled Report button.

Subscriptions - Reports

Scheduled Reports For Amirault, Candace

Only Show Users In Role: Members

Amirault, Candace

Name	Schedule	Next Run Time	Last Run Time	Last Result Status
Amirault, Candace				Amirault, Candace is not subscribed to receive any reports via email.

Follow the same four step wizard as creating your own user report subscription. When complete, you will see the report subscription. you may also edit, delete, or disable the report subscription at any time.

### Subscriptions - Reports

Scheduled Reports For Amirault, Candace		Only Show Users In Role: Members		Amirault, Candace		Add Scheduled Report	
	Name	Schedule	Next Run Time	Last Run Time	Last Result Status		
<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Disable</a>	Budget Cost (Program Summary, Grouped by Facility)	Every Day at 5:15PM	12.15.2007 05:15 PM	Never	N/A	Add Scheduled Report	

**Note:** You can come back and modify the view access criteria at any time. Once you make the update and press Save, the change will be reflected on all users views who have access or had access removed.

**Tip:** Creating subscriptions is ideal to provide licensed users with reports on a scheduled basis without them having to log into e-Builder to access the report.

**Tip:** It is recommended that you show the users how to create their own report subscriptions. This allows them to manage or remove it at any time in the future without having to come to the e-Builder Administrator to change.

## 1.3 API Access

### 1.3.1 About e-Builder oData API

e-Builder offers a way to seamlessly extract raw data from the system through the use of an oData API (Application Programming Interface). Although exports are available in different areas of e-Builder Enterprise™, the API allows you to garner more information with less navigation, and data remains accessible in real time. This data is often necessary to create custom reports, reconcile financial data in incumbent systems, and essentially can be used in an infinite number of ways to meet your business needs. As data is being extracted from e-Builder Enterprise, permission settings are honored with every API call to ensure team members are only accessing information they have access rights to.

#### Why Use the API

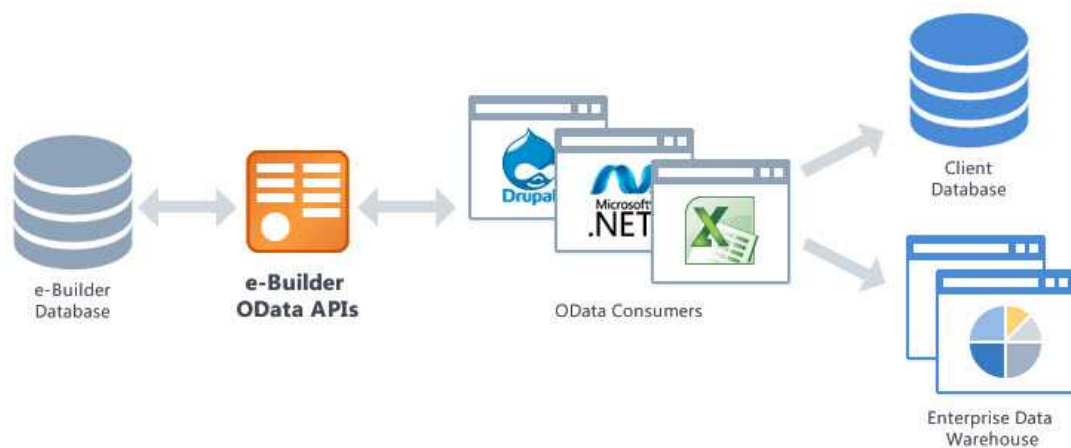
The API can be used to integrate data that resides in e-Builder with other software and databases to create customized solutions. For example:

- Produce executive dashboards with combined data from e-Builder and other internal systems
- Reconcile data in your financial systems with the data in e-Builder
- Leverage e-Builder data to make a case for custom solutions
- Create custom reports with combined e-Builder data

## Understanding oData API

e-Builder's integrated web service APIs ensure seamless integration with other systems and facilitate real-time data exchanges. Our API is based on the Open Data Protocol (oData); an open protocol for sharing data and is also an industry-standard XML data exchange format. oData is a REST (Representational State Transfer) protocol; therefore a simple web browser can view the data exposed through an oData service.

Our API is an interface into e-Builder that allows other applications to make programmatic requests and access the objects and data without using the e-Builder user interface. This gives you the ability to connect or integrate multiple data sets and processes together to create a more customized solution. The flowchart below describes this exchange. oData supports an array of frameworks, applications and plug-ins that allow you to make API calls from e-Builder Enterprise. These third-party tools are referred to by oData as Consumers. To obtain a full list of supported consumers, please visit <http://www.odata.org/ecosystem/>- Consumers tab.



### 1.3.1.1 Query String Options

The oData protocol has a standard programming language used for sorting and filtering data. For instance, all query options are prefixed by a “\$” character. A few examples include:

- \$orderby – allows you order by a specific field.
- \$filter – allows you to filter data
- \$skip – allow you to skip a subset of data, such as null values.

For more information or for a full list of query string options, please see the oData URI Conventions by going to

<http://www.odata.org/documentation/odata-version-2-0/uri-conventions/> and scrolling down to Section 4: Query String Options.


### 1.3.1.2 Response Codes

When oData is queried, a response code is given. Below are the common responses:

- 200: The request has succeeded
- 400: Invalid request
- 401: Unauthorized: Access is denied due to invalid credentials
- 404: Resource not found for the segment you requested
- 429: Too Many Requests. Throttling limit has been exceeded
- 500: Server side error

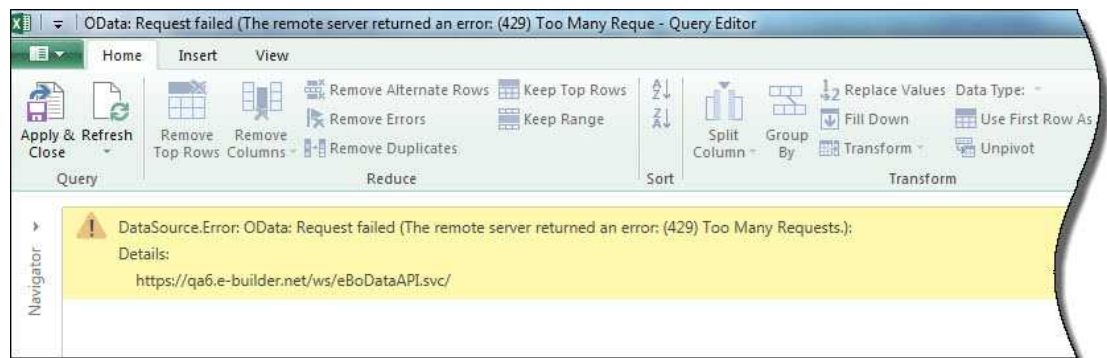
### 1.3.1.3 Throttling

Throttling has been applied to the e-Builder API. Understanding this concept will optimize your use of the API. Throttling refers to the number of API calls allotted within a specified window of time. This is a common practice used among many software companies such as Adobe, Facebook, and Twitter, to name a few. This mechanism is used to prevent the degradation of system performance. By default, 200 API calls are allowed within a 15 minute interval. Each time a call is made to the database, you will receive a message in the response header that includes the total number of calls allowed (X-RATE-LIMIT-LIMIT), the number of calls that remain (X-RATE-LIMIT-REMAINING), and the time at which additional calls can be made (X-RATE-LIMIT-RESET).

 **Example:** oData Response Header

HTTP/1.1 200 OK  
 Cache-Control: no-cache  
 Content-Type: application/atom+xml; charset=utf-8  
 X-RATE-LIMIT-LIMIT: 15  
 X-RATE-LIMIT-REMAINING: 11  
 X-RATE-LIMIT-RESET: 4/16/2014 10:44:20 AM  
 DataServiceVersion: 2.0;  
 Set-Cookie: ASP.NET\_SessionId=t2prcfcm3c5i5g45urvvhf55; path=/; secure; HttpOnly  
 X-FRAME-OPTIONS: SAMEORIGIN  
 Date: Wed, 16 Apr 2014 14:44:04 GMT  
 Content-Length: 1131228

**Note:** Although we make this information available, whether or not it displays in its entirety will depend on the tool that is being used. Depending on the tool, there may or may not be settings available that allow you to see all the information available in these alerts.



**Figure 1:** Sample Throttle Message in Microsoft© Excel© Power Query

The following actions constitute an API call:


**Note:** Depending on the tool, data is initially rendered in a preview window. If the operations listed below are completed within this window and it requires a call to the e-Builder database, it is considered an API call.

**Tip:** It is typical in most API consumer applications to have an action similar to “Apply and Close” which will close the preview window and allow you to manipulate data in their native application, without requiring a call to the e-Builder database. If you’ve already accessed updated information, use this function to reduce the amount of API calls necessary and remain within the threshold.

- Refreshing the page
- Viewing a new e-Builder object
- Filtering



- Sorting

 **Note:** If you foresee a need to make more than 15 calls within a 15 minute window, please contact e-Builder Support.

#### 1.3.1.4 Paging

The results of an API query may result in hundreds of pages of data. To optimize performance, the amount of data visible on a single page will be limited to a certain amount per page. Additional results will appear on subsequent pages.

Page limitations are based on the data type, as follows:

Data Type	Paging Limits
1. Bids	50
1. Bidders	50
1. Bid packages	50
1. Bid scope items	50
1. Budgets,	100
1. Budget line items & Cost Summary	100
1. Calendar events	50
1. Capital plans	50
1. Cash flow items (Current)	100
1. Commitments	100
1. Commitment line items	100
1. Commitment changes & items	100
1. Contacts	500

1.	Document log by project	100
1.	Forecast items (Current)	100
1.	Form types and instances	100
1.	Funding Sources	100
1.	Funding Rules & Distribution	100
1.	Invoices & Items	100
1.	Planning scenarios	50
1.	Processes & Instances	100
1.	Process Line Items	100
1.	Process routing history	100
1.	Projects	100
1.	Project Issue Types & Issues	100
1.	Roles & Members	50
1.	Schedule & Tasks (Current)	50
1.	Submittal Packages	100
1.	Submittal Items	100
1.	Users	100

### 1.3.1.5 Supported e-Builder Entities

Below is a list of supported e-Builder data types. Note that all entities are written as a single word, which is the convention that should be followed when querying data.

- BudgetItems
- Budgets
- Cashflow
- CashflowItems
- CommitmentChangeItems
- Commitments
- InvoiceItems
- Invoices
- Projects
- Users

## 1.3.2 Manage API Access Keys

### 1.3.2.1 Create New API Keys


This task can be completed by:

- *Account Administrators*

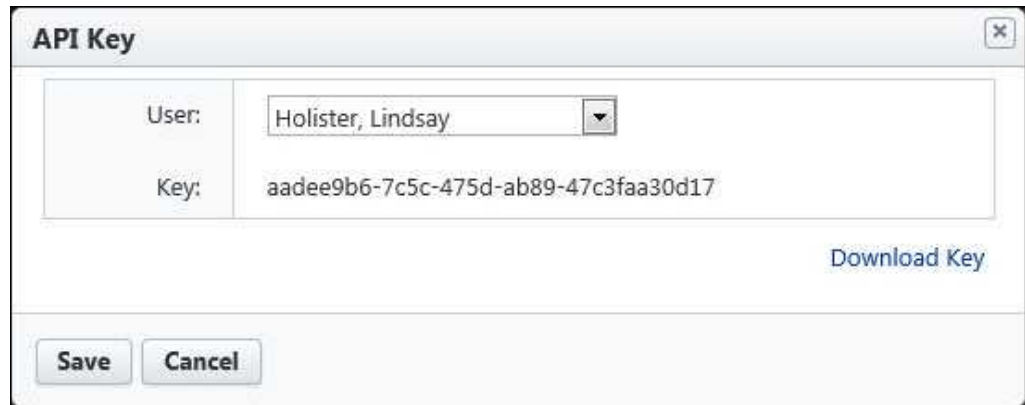
API keys are unique 30 character passwords required for accessing e-Builder data from the API Consumer. Keys are specific to the assigned user and only one key can be generated per person. API keys can be created for yourself or other team members. Typically, the API will be used by personnel responsible for generating reports or IT professionals. This task supports the initial creation of an API key and generating a new key if the previous key was lost.

To create a new API key:

1. Click the **Setup** tab from the Top Navigation tabs.

 **Note:** If the Setup tab is not visible, click the Plus sign, and then click the Setup link.

2. In the Administration Tools section, click **API Access**. The API Access page displays.
3. Click **Create Key**. The API Key pop-up window displays.



The screenshot shows a dialog box titled "API Key". It has a close button in the top right corner. The dialog contains two main fields: "User" and "Key". The "User" field is a dropdown menu with "Holister, Lindsay" selected. The "Key" field is a text box containing the alphanumeric string "aadee9b6-7c5c-475d-ab89-47c3faa30d17". To the right of the "Key" field is a link labeled "Download Key". At the bottom of the dialog are two buttons: "Save" and "Cancel".

4. Click the **User** drop-down arrow to select the person to assign the key to.
5. To download a text file that includes the username and key, click **Download Key**.
6. Click **Save**.

Related Topics:

- [Enable/Disable API Keys](#)
- [About e-Builder oData API](#)

### 1.3.2.2 Enable/Disable API Keys


This task can be completed by:

- *Account Administrators*

API Keys can be disabled at any time, which will temporarily revoke the person's access to API data until their key is enabled again.

To enable or disable an API key:

1. Click the **Setup** tab from the Top Navigation Tabs.

 **Note:** If the Setup tab is not visible, click the Plus sign, and then click the Setup link.

2. In the Administration Tools section, click **API**. The API Access page displays.
3. To disable an API key, click the **Disable** link next to the person's name.

Or

To enable an API key, click the Enable link next to the person's name.

Related Topics:

- [Create New API Keys](#)
- [About e-Builder oData API](#)

### 1.3.3 Access the API Consumer

The API can be used with an array of API consumers that may already be accessible to you. To obtain a full list of supported tools, please visit <http://www.odata.org/ecosystem/> - Consumers tab.

#### Prerequisites


After you've opened the API Consumer, you will need the following sets of information to make an API call.

- URL: <https://API.e-builder.net/eBoDataAPI.svc/>
- e-Builder username
- API Access Key

Related Topics:

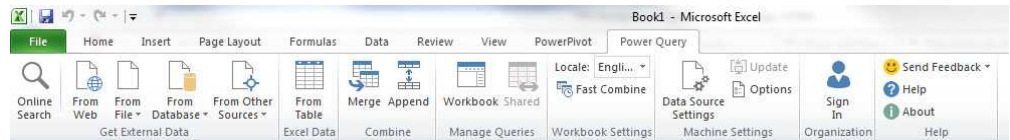
- [About e-Builder oData API](#)
- [Create New API Keys](#)
- [Enable/Disable API Keys](#)

#### 1.3.3.1 Sample API Call Using Microsoft® Excel® Power Query

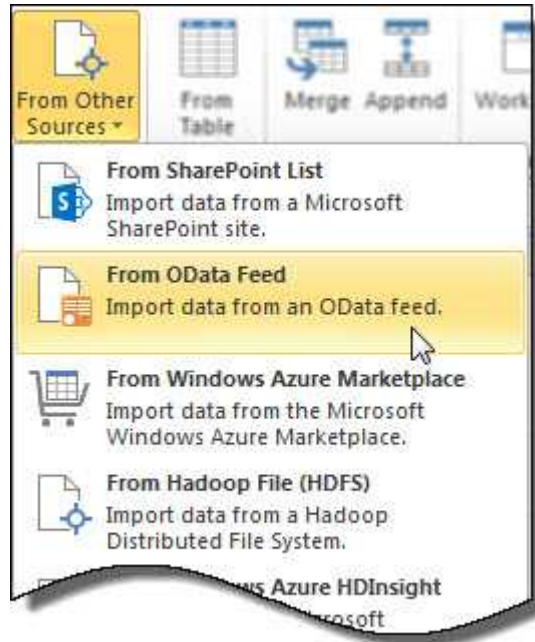
 **Example:** The example that follows uses the Microsoft Excel Power Query plug-in; however an array of applications, frameworks and plug-ins can be used. To obtain a full list of supported API Consumers, please visit <http://www.odata.org/ecosystem/>- Consumers tab. For instructions on connecting with other API Consumers, please see the tool's native help documentation.

To set up an API connection using Power Query:

1. [Download Power Query](#).
2. From the Microsoft Excel ribbon, click the **Power Query** tab.



3. Click the **From Other Sources** drop-down arrow and select **From oData Feed**.



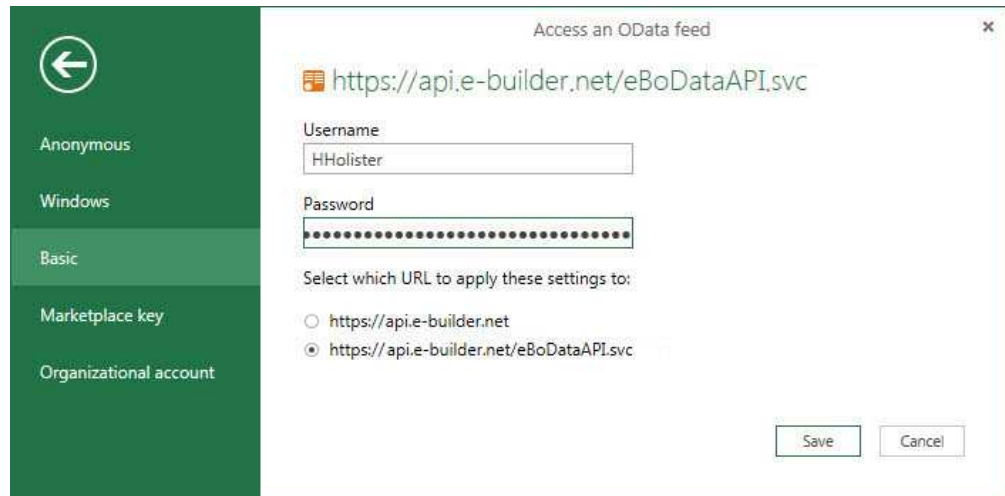
The OData Feed pop-up window displays.



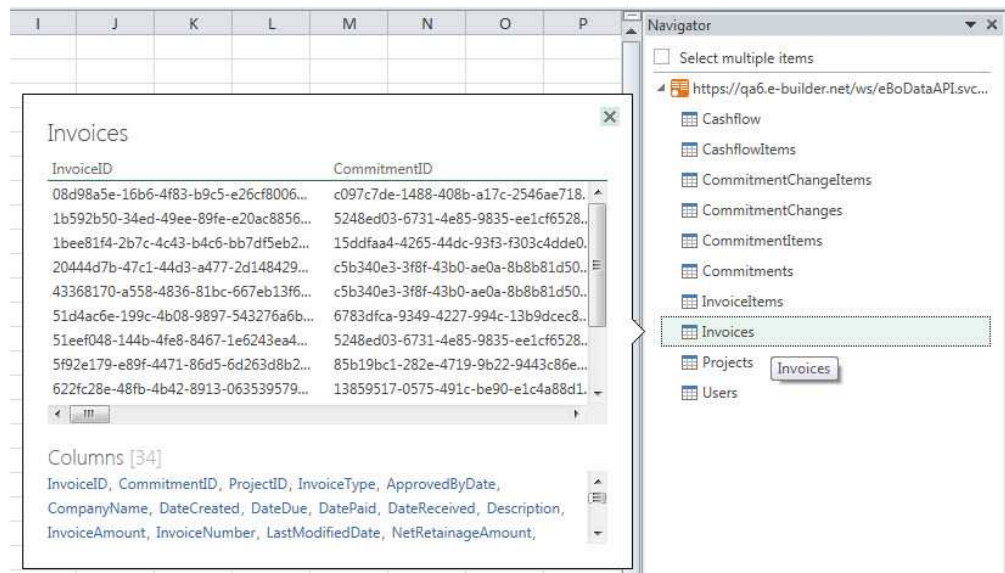
4. In the URL field, enter `API.e-builder.net/eBoDataAPI.svc/`

**Note:** To access a specific cost entity, include it at the end of the URL. For example, to query Invoices, enter the URL as follows: <https://api.e-builder.net/eBoDataAPI.svc/Invoices>. If an entity is not specified, a list of all available entities will display. For a complete list and their conventions, see [Supported e-Builder Entities](#).

- Click **OK**. The Access an oData feed window displays.
- From the Left Navigation pane, click **Basic**.



- Enter your e-Builder username and API access key.
- Select the second radio button option, `https://api.e-builder.net/eBoDataAPI.svc`
- Click **Save**. The Power Query spreadsheet displays.
- From the **Navigator**, located on the right-side of the page, double-click an object to display its contents.



The output file displays in a preview window.

InvoiceID	CommitmentID	ProjectID	InvoiceType	ApprovedBy/Date	CompanyName	DateCreated	DueDate	DatePaid
088983e-184c-4833-86c3-c5b0780c121a	087f19e-1488-488b-e71c-7258a6a17056	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	9/14/2012 12:00:00 AM	Flora's Tech Crew	9/14/2012 8:48:28 PM	null	null
16529250-54e4-48e4-49e4-c0a38556b2	5248e405-4731-4485-9835-e119523879	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	9/13/2012 12:00:00 AM	Flora's Tech Crew	9/13/2012 2:11:03 PM	null	null
18ee8174-2b71-6433-84c5-8d7f5e028584	15d0f84-4261-4465-93f5-f308c48e0de4	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	9/15/2012 12:00:00 AM	South East Contractors	9/15/2012 5:55:13 PM	null	null
20444679-4711-443d-4777-2d118429535b	c3a34e3-39f7-438d-a67e-88a81a5500a1	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	9/13/2012 12:00:00 AM	Cloudy Construction Depot	10/18/2011 5:57:36 PM	null	null
43388570-e03d-482b-83a0-8f169129a79c	c3a34e3-39f7-438d-a67e-88a81a5500a1	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	12/20/2011 12:00:00 AM	Cloudy Construction Depot	12/20/2011 6:02:55 PM	null	null
514942e4-124b-4638-8867-54837946a081	978301a-9349-4227-996c-13836aee88f8	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	8/6/2012 12:00:00 AM	SCC Soft Computer	8/6/2012 9:02:34 PM	null	null
514942e4-124b-4638-8867-54837946a081	5248e405-4731-4485-9835-e119523879	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	8/6/2012 12:00:00 AM	Flora's Tech Crew	8/6/2012 8:22:47 PM	null	null
592a179-88f-4471-86a5-6a2858b29e61	83a19ac1-3824-4739-8623-944386a2887	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	null	SCC Soft Computer	10/28/2011 15:58 PM	null	null
612c1284-488-4642-8a13-5a333997997f	13809517-7075-491e-9e95-e114a861179c	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	8/6/2012 12:00:00 AM	Cloudy Construction Depot	8/6/2012 9:08:59 PM	null	null
67618264-938-4614-8a64-c7020210797c	75a9e411-e694-6649-997f-10a112a889e8	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	8/2/2012 12:00:00 AM	Flora's Tech Crew	8/2/2012 6:52:17 PM	null	8/2/2012 12:00
6f895956-4904-4834-9265-24b998981a52	678101a-9349-4227-996c-13836aee88f8	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	8/6/2012 12:00:00 AM	SCC Soft Computer	8/6/2012 5:11:03 PM	null	8/6/2012 12:00
cf186705-a871-4640-8676-648148861a1c	e6123a51-2010-4aa2-9882-660a3ba08f6d	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	9/15/2012 12:00:00 AM	Cloudy Construction Depot	9/15/2012 8:44:18 PM	null	null
e9170285-e24d-4368-9646-958ae08c2285	c3a34e3-39f7-438d-a67e-88a81a5500a1	fa35634-1140-4200-886f-447122828c7	CommitmentInvoice	9/13/2012 12:00:00 AM	Cloudy Construction Depot	10/18/2011 5:58:53 PM	null	9/13/2012 12:00

**Tip:** To view the data in the main Excel spreadsheet, click **Apply and Close**. This will allow you edit the content and also refrain from making additional API calls.

## 1.4 Bidding

The e-Builder Bidding Module provides the ability to manage your project bids to non-licensed users. The bids are sent from e-Builder via email or fax based upon the bidder information. Certain key elements of the bid process can be configured to assist in the notification and tracking of bids.

### 1.4.1 Access Bidding Settings

To access bidding setup options:

1. Click the **Setup** link.
2. In the Administration Tools section, expand **Bidding**. All bidding related settings display.

### 1.4.2 Bidding Custom Fields

Bidding custom fields are definable fields that drive reporting for bids when bidding and sending invitations. Custom fields are created to contain additional event information that is not part of the standard bid information or used in reports to define or separate bids.

There are two options for bidding custom fields: Bid Package and Invitation.



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Custom fields are added to this section in the same way. The procedure below describes adding custom fields to both bid package and invitation.

### Add Bid Package or Invitation Custom Fields

To add bid package or invitation custom fields:

1. Go to the Bidding settings. For more information, see [Access Bidding Settings](#).
2. Expand **Custom Fields**.
3. Click **Bid Package** or **Invitation**.
4. Click **Add Field**.
5. Select a data type, and then click **Next**.
6. On the **Custom Field Details** page, enter a name for the custom field in the space provided after **Field Label**.
7. Click **Next**.
8. Review the details of the custom field.
9. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

Or


If details are correct, click **Save**.

### 1.4.3 Color Codes

Color codes will only be applicable in the Bidding module if the manage codes feature is being utilized. Setting thresholds is another way to identify important sets of information, but thresholds differ from simple color coding because it allows you to assign minimum, mid range, and high range numerical values for each applicable area in the bidding module. Color codes are assigned to each threshold value to serve as a visual indicator when bid statuses have reached or surpassed

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certain thresholds. Thresholds have to be enabled in order to display throughout the Bidding module. Enable thresholds for each individual item by selecting the respective checkboxes.

 **Note:** You can come back and modify the thresholds at any time.

The color code thresholds are applicable in the Bidding module for the following areas:

- Invited Bidders
- Pending Bidders
- Accepted Bidders
- Declined Bidders
- Bid Totals
- Awarded Bids

For each of these areas, you can set a value and corresponding color to represent that threshold.

 **Tip:** It is recommended when setting thresholds to set them based upon your average bid responses. For example, you might want to set it up such that it shows red when the number of invited bidders for a particular construction code is less than 3, yellow if greater than 3 and less than 5, and green if greater than 5.

To set bidding color coded threshold values:

1. Go to the bidding settings. For more information, see [Access Bidding Settings](#).
2. Click **Color Codes**. The Color Codes page displays.
3. Select the checkbox next to each item you want to enable thresholds for.
4. For each range, enter the threshold numerical values and select a color code for each value.
5. After all threshold values have been assigned, click **Save**.

#### 1.4.4 Fax Cover Sheets

Bidding fax cover sheets can be configured for bidding messages and invitations to bid. There are three options for creating a fax cover sheet for messages or invitations and a few optional customization settings.

- [Create Template from an Existing Microsoft Word Document](#)
  - [Download a Default Template](#)
-


- [Customize Template with Field Mappings](#)
- [Edit Fax Cover Sheets](#)

#### 1.4.4.1 Create Template from Word® Document

If you already have a bidding message or invitation fax cover sheet prepared, you can simply upload this document to e-Builder and make it a template that can be used whenever needed. You can also [add e-Builder field mappings](#) to the document to automatically populate project information, company information or custom fields.

To create a template from an existing Microsoft Word® document:

1. Go to the bidding settings. For more information, see [Access Bidding Settings](#).
2. Click **Fax Cover Sheets**. The Fax Cover Sheets page displays.
3. Click **Add New Template**. The Add Fax Cover Sheet Template page displays.
4. Enter the name of template in the **Name** field.
5. In the **Status** field, select **Active** to make the template available for use. Select **Draft** to keep the template in draft mode.
6. Click the **Type** drop-down arrow and select the type of bidding cover sheet you are creating.
7. Click **Browse** to search for and select the Microsoft Word® document you'd like to use as your template.
8. In the **Project Assignments** section, select the project(s) that you'd like to assign the template to.
9. Click **Add**. The selected project(s) is added to the box on the right.

 **Note:** If you do not specify the project(s) that will use this template, the template will be available in all projects.

10. Click **Save**.

#### 1.4.4.2 Download a Default Template

**Tip:** After you have downloaded the template you'd like to use, save it to your local machine and then add it to e-Builder as a template. For instructions, see [Create Template from Word Document](#).

To download a default template:

1. Go to the bidding settings. For more information, see [Access Bidding Settings](#).
2. Click **Fax Cover Sheets**. The Fax Cover Sheets page displays.
3. Click the **Download Default Fax Cover Sheet Templates** link.

Name	Description	Type	File Name	File Name	Project Assignment	Status	Output	Created By	Date Created
Invitation to Bid		Bidding Invitation To Bid Cover Sheet	Fax Cover Sheet Invitation.doc			Active	Doc	Sylverne, Benouchka	10.31.2011

4. Select the type of template you want to open (Invitation to Bid or Message). The default template displays.

Related Topic:

- [Create Template from Word Document](#)

#### 1.4.4.3 Customize Template with Field Mappings

e-Builder field mappings are available to help you quickly capture data that is stored in the system into your fax cover sheet. Information such as project name, project contact, custom fields, various company information can all be automatically populated into your fax cover sheet. Using field mappings is easy and will help you save a lot of time when it is necessary to customize each fax cover sheet according to bidder and project specifications.

To customize your template using field mappings:

- [Obtain Field Mappings](#)
- [Add Field Mappings to your Template](#)

**Obtain Field Mappings:**

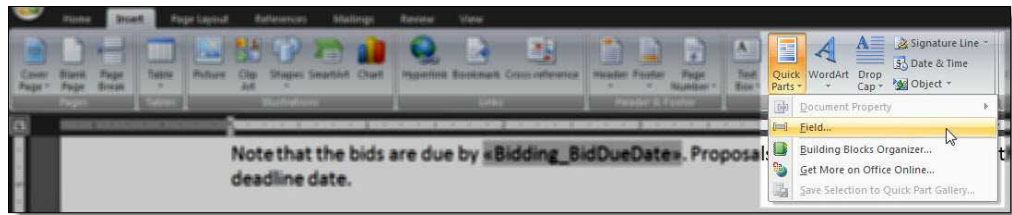
1. Go to the bidding settings. For more information, see [Access Bidding Settings](#).
2. Click **Fax Cover Sheets**. The Fax Cover Sheets page displays.
3. Click the **Go to Mail Merge Field Mappings** link.

4. Click the **Fax Cover Sheet Field Mappings For ...** drop-down list, shown below, and select the type of field mappings you want to see. Various field mappings display for you to choose from.

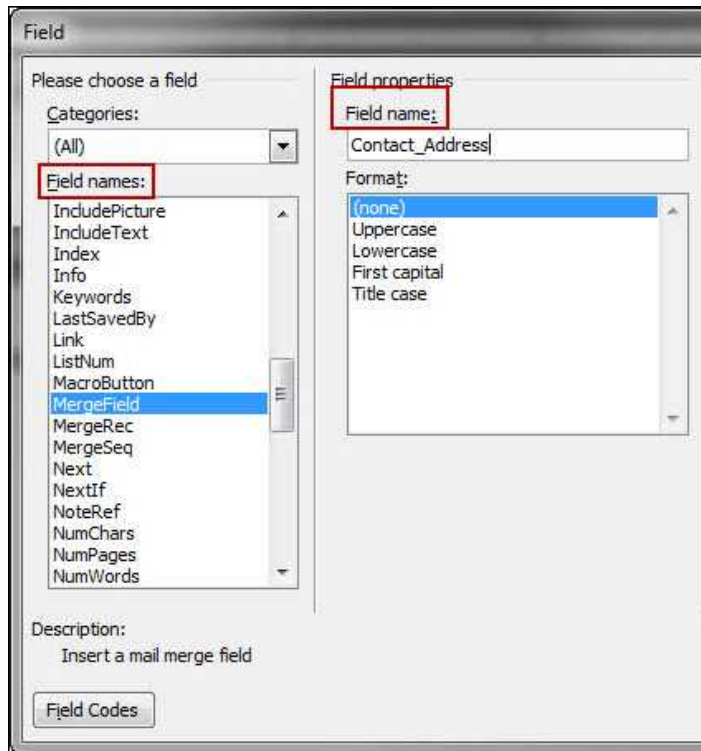
**Tip:** Keep this page open or print the merge codes for easy access when adding the field mappings to your template.

## Add Field Mappings to your Template (Using Microsoft Word 2007®):

1. Open the template you want to add field mappings to.
2. Place your cursor in the position you want to add the merge code.
3. Click the **Insert** ribbon.
4. Click the **Quick Parts** drop-down arrow, and then select **Field**.



- In the **Field names:** section, scroll down and select **MergeField**.



- Enter the e-Builder merge code in the **Field Name** field.
- Click **OK**. The merge code is added to the word document.
- Save the document to your local machine.
- To store this document as a template in e-Builder, see [Create Template from Word Document](#).

#### 1.4.4.4 Edit Fax Cover Sheets

To edit fax cover sheets:

- Go to bidding settings. For more information, see [Access Bidding Settings](#).

2. Click **Fax Cover Sheets**.
3. Click the title of the template.
4. Click **Edit**. The Edit Fax Cover Sheet Template page displays.
5. Make any or all of the modifications listed below.
  - Change template name
  - Add/Remove/Edit template description
  - Change status – Make template Active (available for use) or Draft
  - Change type – Invitation to Bid or Bidding Message
  - Change template file - Upload a new fax cover sheet template
  - Assign template to projects
6. Click **Save**.

### 1.4.5 Bid Document Permissions

As the administrator, you can assign a role to certain folders in e-Builder so that only those folders can be selected to map as a folder for the project bid. This feature prevents users from assigning the main documents folder as the mapped Bid Documents folder.

To manage bid document permissions:

1. Go to bidding settings. For more information, see [Access Bidding Settings](#).
2. Click **Bid Document Permissions**.
3. Click the drop-down arrow and select the managing role.
4. Click **Save**.

### 1.4.6 Managing Bid Scope Templates


#### 1.4.6.1 Add Bid Scope Templates

Bid scope templates eliminate the need to manually create a bid scope. The template can be used for any bid package, and across all projects. Administrator and bid managers are able to set up similar bids using templates from various projects. Optionally, existing items can be appended to the template in order to update the details of the original line items in tandem.

To add bid scope templates:

1. Go to Bidding settings. For instructions, see [Access Bidding Settings](#).
2. Click **Templates**.

3. Click **Add**.
4. Enter a name for the template in the **Name** field.
5. In the **Status** field, choose to make this template active or draft.

 **Note:** Active templates will be automatically available to users.

6. Optionally, enter a description for this template to detail how and when it should be used, if applicable.
7. Click **Save**.

*This is part 1 of 2 in creating the bid scope template. After a template has been added, you will need to [add items to it](#).*

Related Topics:


- [Add Items to Bid Scope Templates](#)
- [Bid Scope Template Page Overview](#)

#### 1.4.6.2 Add Items to Bid Scope Templates

After a bid scope template has been created, bid scope items and additional information records need to be added to the template.

To add items to bid scope templates:

1. Go to Bidding settings. For instructions, see [Access Bidding Settings](#).
2. Click **Templates**.
3. Click the title of the template you want to add items to. The Bid Scope Template page displays.
4. Optionally, create bid scope sections. See [Create Bid Scope Sections](#) for instructions.

 **Note:** From here you have the option to create sections, and then add items to those sections. Creating sections is not required, but doing so helps you further itemize the sections of the bid scope, clearly separating the different areas of scope; such as general conditions and other fees, base bid, and alternates. This makes it easier for bidders to submit their bids and having a standard format simplifies the process of reviewing bids as well.

5. Add Scope Items. See [Add Items to Bid Scope Templates](#)
-




6. Add Additional Information records. See [Add Additional Information Records to Templates](#).

Related Topics:

- [Add Bid Scope Templates](#)
- [Bid Scope Template Page Overview](#)

#### 1.4.6.2.1 Create Bid Scope Sections

Creating sections is not required, but doing so helps you further itemize the sections of the bid scope, clearly separating the different areas of scope; such as general conditions and other fees, base bid, and alternates. This makes it easier for bidders to submit their bids and having a standard format simplifies the process of reviewing bids as well.

 **Note:** This procedure is a continuation of [adding items to bid scope templates](#).

To create bid scope sections:


1. From the **Scope** tab, click **Create Section** to add sections to the bid scope. The Add Bid Section window appears.
2. Complete all necessary fields.
  - **Name** – Enter the name of the section
  - **Type** – The **Base Bid** is the main section to collect the bids and is required in all bid scope definitions. Choose **Alternate** for all other sections.
  - **Include Cost Per SqFt.** – If square footage was entered in the bid details, selecting this checkbox will allow the system to calculate the square footage per bid scope item in the bid tabulation. If this checkbox is selected, you are also able to filter by square footage on the Bid Tabulation tab.
  - **Include Percent of Base Bid** – This option is directly related to bid tabulation. Select this checkbox to enable the ‘display percent of base bid total’ option located on the Bid Tabulation tab.
  - **Include Percent of Section** – This option is directly related to bid tabulation. Select this checkbox to enable the ‘display percent of section name’ option located on the Bid Tabulation tab.

3. Click **Save**.

Related Topics:

- [Add Bid Scope Templates](#)
- [Add Additional Information Records to Templates](#)
- [Bid Scope Template Page Overview](#)

#### 1.4.6.2.2 Add Items to Bid Scope Templates

 **Note:** This procedure is a continuation of [adding items to bid scope templates](#).

To add items to the bid scope template:


1. Click **Add Item** located in the respective section. The Add Bid Item dialog displays.
2. Enter all required fields
3. Click **Save**. The popup window remains open, allowing you to add additional line items.
4. When you are done adding items, click **Cancel**.

Related Topics:

- [Add Bid Scope Templates](#)
- [Create Bid Scope Sections](#)
- [Add Additional Information Records to Templates](#)
- [Bid Scope Template Page Overview](#)

#### 1.4.6.2.3 Add Additional Information Records to Templates

The additional information feature allows bid managers to capture and track pertinent data about potential bidders to help you make the best and most informed decision. You can choose to add questions that you require potential bidders to answer, include relevant data that potential bidders cannot see, use the data for bid tabulation, or all of the above.

 **Note:** This procedure is a continuation of [adding items to bid scope templates](#).

Individual additional information records can be added one at a time or you can add records that have been used in different projects. Instructions for both methods are provided below:

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- [Add Additional Information Records from a Project](#)
- [Add New Additional Information Records](#)

## Add Additional Information Records from a Project

To add additional information records to the bid scope template:

1. Click the **Additional Information** tab.
2. To include records used in a particular project, click **Add From Project**. The Add Additional Information window appears.
3. Click the **Project** drop-down arrow to select the project from which to copy the additional information records.
4. Select a bid package from the list of results.
5. Select the check box next to the record(s) you want to add.
6. Click **Add**.
7. Click **Close**.

## Add New Additional Information Records

1. Click the **Additional Information** tab.
2. In the **Prompt/Question** field, enter the prompt or question.
3. Select all check boxes that apply:
  - **Bidder Entry** – Select this check box to allow the prompt/question to be visible for bidders to fill out.
  - **Required** – Select this check box to make the prompt/question a required field for bidder to fill out.
  - **Include in Bid Tabulation** – Select this check box to include the prompt/question in the bid tabulation. This facilitates comparing bidders based on additional information.
4. Click **Save**.

Related Topics:

- [Add Bid Scope Templates](#)
- [Create Bid Scope Sections](#)
- [Bid Scope Template Page Overview](#)

### 1.4.7 Bid Scope Templates Page Overview

The Bid Scope Templates page lists all the account templates, including filtering capabilities and some basic controls and information. You can filter by template name, status or custom field, if configured. Filtering helps you narrow down to the templates that display in the results table. Below is an overview of the fields and buttons located on this page.

Field	Description
<b>Filter Templates</b>	
<b>Name</b>	Enter the name of the template(s) you want to filter for in this field.
<b>Status</b>	Click this drop-down arrow to select a status to filter by.
<b>Custom Fields</b>	Click this drop-down arrow to select a custom field to filter by. You can also type custom field keywords to filter by.
<b>Filter</b>	Click this button to filter by entered criteria.
<b>Bid Scope Templates</b>	
<b>Add</b>	Click this button to add a budget template. For detailed steps, see <a href="#">Add Bid Scope Templates</a> .
<b>Copy</b>	Click this button to copy a budget template.
<b>Delete</b>	Click this button to delete the selected template.

### 1.4.8 Bidding Options

The Bidding Options settings allow you to alter delivery methods, determine how project contacts are added, and if the bid tabulation feature is turned on, you can also manage bid viewing settings.

To modify bidding options:

1. Go to bidding settings. For more information, see [Access Bidding Settings](#).
2. Click **Options**. All options settings display. see the table below for a description of each option.
3. Click **Save**.

Options	Descriptions
<b>Bid Options</b>	
<p><b>Delivery Method</b></p> <ul style="list-style-type: none"> <li>• Deliver via e-mail if contact has one, else fax</li> <li>• Deliver via fax if contact has one, else e-mail</li> <li>• Deliver via both e-mail and fax if the contact has them</li> </ul>	<p>Select this option to make email the primary form of contact and fax the secondary.</p> <p>Select this option to make fax the primary form of contact and e-mail the secondary.</p> <p>Select this option to send both email and fax if available.</p>
<p><b>Project Contacts</b></p> <ul style="list-style-type: none"> <li>• Automatically add all invited bidder contacts and companies to project contacts</li> <li>• Automatically add only awarded bidder contacts and companies to project contacts</li> </ul>	<p>Select this option to automatically add invited bidders and companies to project contacts. This is useful so that you will automatically see those contacts in your project contact directory.</p> <p>Select this option if you only want to add awarded bidders and companies to the project's contact.</p>

<ul style="list-style-type: none"> <li>Do not automatically add bidder companies and contacts to project contacts</li> </ul>	<p>Select this option if you do not want any contacts to be automatically added to the project's contacts.</p>
<p><b>Required # of Users That Must Witness Sealed Bid Openings</b></p>	<p>Click the drop-down arrow to select the number of witnesses required before a sealed bid can be opened. This feature is designed to enforce organizational policies and protect against collusion.</p>
<p><b>Allow Bid Tabulation To Be Opened Prior To Bid Due Date</b></p>	<p>Select this checkbox to enable the bid tabulation feature prior to the bid due date. This feature allows bid managers and contractors to get a head start on viewing the bids that have come in. This option would not be set if you have a strong policy in place and/or you initiate public bidding.</p>
<p><b>Enable Electronic Bid Submission</b></p>	<p>This setting is enabled by default and makes it possible for bidders to submit bids electronically. If necessary, this setting can be changed per bid package. For more information, see Add/Edit Bid Package Details Page Overview - Allow Electronic Bid Submission.</p> <p>Clear this check box to restrict electronic submissions for the entire account. This might be necessary for public bid clients who require hard copy signatures. Typically, these clients bid on their projects through websites, newspapers, and other public means.</p>
<p style="text-align: center;"><b>Bid Award to Commitment</b></p> <p>The settings in this section allow you to enable/disable, and if applicable, customize the ability to automatically initiate a commitment process from an awarded bid package. Cost data is automatically populated into the cost fields from the awarded bid.</p>	

<b>Bid Award to Commitment</b>	<p>Click this drop-down arrow to select an option for initiating a commitment process after a bid has been awarded. Choose from the following options:</p> <p><b>No Commitment (None)</b> - Select to disallow the initiation of a commitment process upon awarding a bid package. Commitment fields will auto-populate with data from the awarded bid package.</p> <p><b>Commitment (Non Process Commitment)</b> - Select to enable the creation of a non-process commitment upon awarding a bid package.</p> <p><b>Process</b> - All commitment process display in this section for you to choose one that may be initiated and populated with contract data from an awarded bid package.</p>
<b>Include Bid Response Attachments</b>	Select to automatically attach to the commitment, the files that were included in bid responses.
<b>Allow this setting to be changed on individual bid packages</b>	Select to allow this setting to be modified per bid package.

### 1.4.9 Public Registration Setup

The public bidding registration setup page allows you to include additional fields for bidders to enter when registering. You can make fields optional or required.

To add additional fields for bidder registration:

1. Go to bidding settings. For more information, see [Access Bidding Settings](#).
2. Click **Public Registration Setup**.
3. Select your desired field(s) in the **All Fields** column.
4. Click the **Add** button located between the All Fields and Available Fields columns.
5. To make fields optional, leave them in the Available Fields column

Or

To make fields required, select the field, and then click the **Add** button located between the Available Fields and Required Fields column.

6. Click **Save**.

### 1.4.10 Units of Measure

When building out a project's bid scope, you may have to enter items by their units of measure. If these settings are not already defined or if you'd like to additional units of measure, follow the steps below.

1. Go to bidding settings. For more information, see [Access Bidding Settings](#).
2. Click **Units of Measure**. If these settings are already defined, a list of available units of measure (UOM) displays. Otherwise, continue to step three to define UOM.
3. Click **Use Defaults** to use a default list.

Or

Enter each individual UOM abbreviation and description per line.

4. Click **Save**.

## 1.5 Calendar

The e-Builder Calendar Module is a company-wide and project-specific calendar that brings all project participants, both internally and externally together for scheduling in one place. The e-Builder calendar integrates with Microsoft Outlook, and automatically syncs your e-Builder calendar events to your Outlook Calendar. If your project teams consist of multiple companies using multiple calendars, e-Builder manages events by allowing you to invite your e-Builder users and contacts as well as external users and then tracking attendance, meeting minutes, and progress on resulting action items.

### 1.5.1 Access Calendar Settings

To access calendar settings:

1. Click **Setup**.
-



2. In the **Administration Tools** section, expand the **Calendar** link. All calendar related settings display.

### 1.5.2 Event Custom Fields

Event custom fields are definable fields that drive reporting for calendar events. Custom fields are created to contain additional event information that is not part of the standard event data or used in reports to define or separate events.

See [Managing Custom Fields](#) for information on creating event custom fields.

### 1.5.3 Event Location Setup

Event location setup allows you to create a list of meeting locations for the meeting organizer to optionally choose from. This is helpful if there are some common meeting locations for your teams. This option displays as a drop-down arrow in the Calendar module.

To create a list of event locations:

1. Go to calendar settings. For more information, see [Access Calendar Settings](#).
2. Click **Event Location Setup**. The Manage Event Location Settings page displays.
3. Click the **Enable Location Drop Down** checkbox.
4. In the **Drop Down List Options** section, enter meeting locations, one per line.
5. Click **Save**.

### 1.5.4 Work Week Setup

The work week setup option allows you to set the start day for the 5-day work week. This option controls how the calendar is displayed to users when work week view is selected. Monday is selected by default.

To modify the work week settings:

1. Go to calendar settings. For more information, see [Access Calendar Settings](#).

2. Click **Work Week Setup**. The Work Week Setup page displays.
3. Click the **Start day for the 5-day work week calendar** drop-down arrow and select the day of the week that will begin the work week.
4. Click **Save**.

### 1.5.5 Meeting Minutes Setup

The Meeting Minutes component allows the minute taker to record discussion topics within e-Builder. The review and approval mechanism ensures that all participants agree with notes and action items before minutes are published. Optionally, you can assign action items using an assigned form type. Action items are updated in real time, so all participants are aware of item status before the next meeting. The Meeting Minutes component also gives you the ability to carry open items forward from previous meetings, allowing you to keep track of your progress.

Before the meeting minutes feature can be used in the Calendar module, it must first be configured in the setup area. Part of meeting minutes' setup includes the following four procedures:

- [Enable Meeting Minutes](#)
- [Set Form Type for Action Items](#)
- [Add/Delete Meeting Types](#)
- [Add/Delete Meeting Topics](#)

#### 1.5.5.1 Enable Meeting Minutes

The meeting minutes feature is not available by default; it must be enabled before it can be used. To enable meeting minutes:


1. Go to calendar settings. For more information, see [Access Calendar Settings](#).
  2. Click **Meeting Minutes Setup**. The Meeting Minutes page displays.
  3. Select the **Meeting Minutes** checkbox to enable this feature.
  4. Click **Save**.
-

### 1.5.5.2 Set Form Type for Action Items

Optionally, you can designate a form type to be used for action items. Once this form type is used in meeting minutes, it cannot be changed; otherwise there will be a void in previous instances that have already used the form type. Choosing a form type gives the minute taker access to a standard form for each meeting without having to attach a form each time. Additionally, it provides a consistent format – that you choose – to always record action items.

To set a form type for action items:

1. Go to calendar settings. For more information, see [Access Calendar Settings](#).
2. Click **Meeting Minutes Setup**. The Meeting Minutes page displays.
3. Select the **Form Type** drop-down arrow and select a form.

 **Note:** Form types are configured in Setup – Forms – Manage Form Types

4. Click the adjacent **Save** link.

### 1.5.5.3 Add/Delete Meeting Types

Although default meeting types exist you can create your own meeting types to better suit your business needs.

The following procedures are included below:

- [View existing meeting types](#)
- [Add new meeting types](#)
- [Delete meeting types](#)

To view existing meeting types:

1. Go to calendar settings. For more information, see [Access Calendar Settings](#).
2. Click **Meeting Minutes Setup**. The Meeting Minutes page displays with all existing meeting types in view.

To add new meeting types:

1. Go to calendar settings. For more information, see [Access Calendar Settings](#).
2. Click **Meeting Minutes Setup**. The Meeting Minutes page displays.
3. Enter the name of the meeting type in the **Meeting Type** field.

4. Click **Save**.

To delete meeting types:

1. Go to calendar settings. For more information, see [Access Calendar Settings](#).
2. Click **Meeting Minutes Setup**. The Meeting Minutes page displays.
3. Select the checkbox next to the meeting type(s) you want to delete.
4. Click **Delete**.

#### 1.5.5.4 Add/Delete Meeting Topics

Although default meeting topics exists you can create topics to better suit your business needs.

The following procedures are included below:

- [View existing meeting topics](#)
- [Add new meeting topics](#)
- [Delete meeting topics](#)

To view existing meeting topics:

1. Go to calendar settings. For more information, see [Access Calendar Settings](#).
2. Click **Meeting Minutes Setup**. The Meeting Minutes page displays.
3. Click the **Meeting Topics** tab. All existing meeting topics display.

To add new meeting topics:

1. Go to calendar settings. For more information, see [Access Calendar Settings](#).
2. Click **Meeting Minutes Setup**. The Meeting Minutes page displays.
3. Click the **Meeting Topics** tab.
4. Enter the name of the meeting topics in the **Topic** field.
5. Click **Save**.

To delete meeting topics:

1. Go to calendar settings. For more information, see [Access Calendar Settings](#).
  2. Click **Meeting Minutes Setup**. The Meeting Minutes page displays.
-

3. Select the checkbox next to the meeting topic(s) you want to delete.
4. Click **Delete**.

## 1.5.6 Mail Merge Templates

Calendar mail merge templates can be imported for use throughout the Calendar module. A mail merge template will let your users print out meeting details and meeting minutes formatted just the way your organization prefers. A default template is also provided for your convenience, complete with field mappings that will automatically populate fields with data from e-Builder to save you time. Field mappings can be changed on any template, allowing you to pull the data you need.

The following tasks can be taken using Mail Merge Templates:

- [Add New Calendar Templates](#)
- [Download Default Calendar Template](#)
- [Customize Calendar Template with Field Mappings](#)

### 1.5.6.1 Add New Calendar Templates


The calendar template is a predefined form for tracking events and meeting minutes. [Field mappings](#) are included on the template which automatically populates system data such as Attendee name, email role etc. These templates and field mappings save you time and ensure the accuracy of your data. While the template includes default field mappings, you can customize these field mappings in order to capture the information you want. See [Customize Calendar Template with Field Mappings](#) for instructions.

To add a new calendar template:

1. Go to the calendar settings. For more information, see [Access Calendar Settings](#).
2. Click Mail Merge Templates. The Mail Merge Templates page displays.
3. Click **Add New Template**. The Mail Merge Template page displays.
4. Enter the name of template in the **Name** field.
5. In the **Status** field, select **Active** to make the template available for use. Select **Draft** to keep the template in draft mode.
6. In the **Output** field, select **Doc** for a Microsoft Word® or **PDF** for an Adobe


PDF® file.

7. Click **Browse** to search for and select the document you'd like to use as your template.
8. In the **Project Assignments** section, select the project(s) that you want to assign this template to.
9. Click **Add**. All selected projects display in the Assigned to these Projects box.

 **Note:** If a project is not assigned, the template will be available in all projects.

10. Click **Save**.

### 1.5.6.2 Download Default Calendar Template

 **Tip:** After you have downloaded the template, save it to your local machine and then add it to e-Builder. For more information on this procedure, see [Add New Calendar Templates](#).

To download a default template:

1. Go to the calendar settings. For more information, see [Access Calendar Settings](#).
2. Click **Mail Merge Templates**. The Mail Merge Templates page displays.
3. Click the **Download Default Calendar Template** link.

Mail Merge Templates									
Calendar		Show:	All	Go	Show All	Add New Template			
Name ^	Description	Type	File Name	File Name	Project Assignment	Status	Output	Created By	Date Created
Calendar Mail Merge Template		Calendar	Calendar Mail Merge Template.doc			Draft	Doc	Sylverne, Benouchka	11.17.2011
Go to Mail Merge Field Mappings		Download Default Calendar Template		Add New Template					

#### Related Topic:

- [Add New Calendar Templates](#)

### 1.5.6.3 Customize Calendar Template with Field Mappings

E-Builder field mappings are available to help you quickly capture data that is stored in the system into your template. Information such as project name, project contact, custom fields, various company and information can all be automatically populated into your template. Using field mapping is easy and will help you save a

lot of time when it is necessary to customize each calendar template according to project specifications.

To customize your template using field mappings:

- [Obtain Field Mappings](#)
- [Add Field Mappings to your Template](#)

### Obtain Field Mappings:

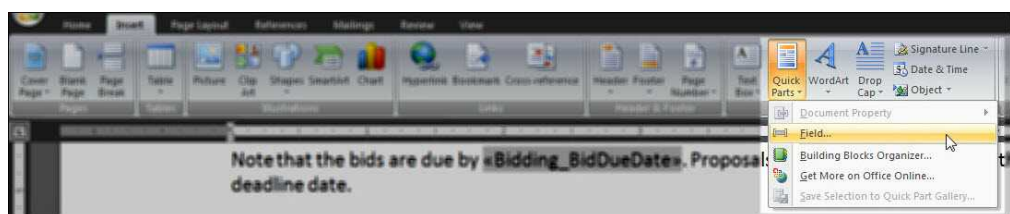
1. Click the Setup link.
2. In the Administration Tools section, click the module name you want to customize the template for.
3. Click **Mail Merge Templates** or **Fax Cover Sheet**. The Mail Merge Templates page displays.
4. Click the **Go to Mail Merge Field Mappings** link.

Mail Merge Templates									
Calendar									
Name	Description	Type	File Name	File Name	Project Assignment	Status	Output	Created By	Date Created
Calendar Mail Merge Template		Calendar	Calendar Mail Merge Template.doc			Draft	Doc	Sylverne, Benouchka	11.17.2011
<a href="#">Go to Mail Merge Field Mappings</a> <a href="#">Download Default Calendar Template</a>									

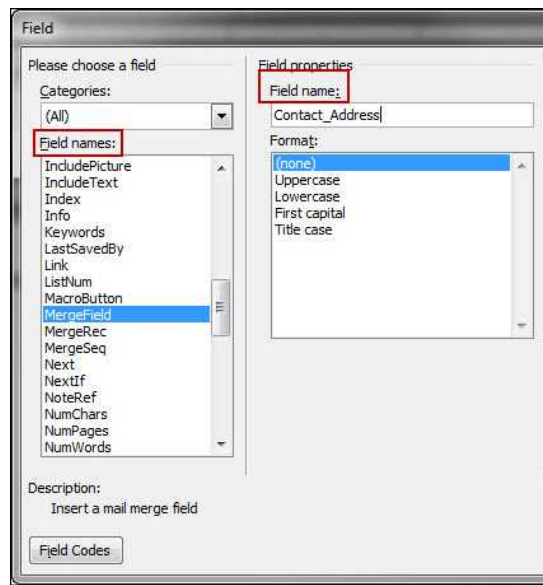
**Tip:** Keep this page open or print the merge codes for easy access when adding the field mappings to your template.

### Add Field Mappings to your Template (Using Microsoft Word 2007®):

1. Open the template you want to add field mappings to.
2. Place your cursor in the position you want to add the merge code.
3. Click the **Insert** ribbon.
4. Click the **Quick Parts** drop-down arrow, and then select **Field**.



- In the **Field names:** section, scroll down and select **MergeField**.



- Enter the e-Builder merge code in the **Field Name** field.
- Click **OK**. The merge code is added to the word document.
- Save the document to your local machine.
- To store this document as a template in e-Builder, see [Add New Calendar Templates](#).

## 1.6 Construction Codes

Construction codes are a structured hierarchy of divisions, and classification codes within each division that are used to standardize information in the construction industry.

In e-Builder they can be associated with companies saved in the Contacts module and used for reporting purposes or to invite contacts in the Bidding module.

### 1.6.1 Import Construction Codes

If your organization is currently using a set of construction codes, and they are saved in MS Excel format. Or if you want to use either the 1995 or 2004 Master Format construction codes, then press the Import button. This will enable you to



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import the full list of Divisions and classification codes.

When the Import button is pressed you are directed to the select file screen of the import process. To view or use the 1995 or 2004 Master Format codes click on the corresponding link. Next, press either Open or Save to open the file, or save it to your computer. To continue with the import process press the Browse button, and a new dialog box will open. In this dialog box select the file and press the open button. When finished press the Next button to proceed.

In the next screen select the column headings from your file that correspond with the construction code and description fields. Press the Next button to proceed to the final step.

Step 3 of the process will confirm how many of the rows in the file are able to be imported. If there are any rows that cannot be imported, then they will be listed as exceptions. Click on the Exceptions tab in the middle of the screen to see the reason why. The Preview will show an example of one of the rows that will be imported. To complete the process press the Import button.

Upon completion the import will be confirmed.

## **1.6.2 Add Construction Codes**

To manually enter new construction codes, press the Add button.

Enter the new code and corresponding description in the appropriate fields. Up to 10 codes can be entered at the same time. To save the new codes press the Save button. To save the codes and add additional ones press the Save and Add More button.

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## 1.7 Contacts

The e-Builder Contacts Module provides the ability to store and manage contact information for companies with whom you do business. The company information is utilized for the Cost and Bidding modules to provide necessary notification capability, reporting and historical information required for these modules. If you are not using these modules, the Contacts module is also utilized as a central contact repository for all contacts.

To add contacts, if you have the assigned permissions you may add contacts one at a time from the Contacts module. If you are an administrator, you have the capability of importing contacts from a Microsoft Excel file. This file can be either manually created or created using the export tool from another contact database (e.g. Outlook, Lotus Notes, Salesforce).

From an administration perspective, Contacts can have custom fields assigned to Companies or Contacts and this is where you would import contacts. To access the Contacts in the Administration Tools area, click on the Contacts link.

### 1.7.1 Company and Contact Custom Fields

Company custom fields are definable fields that drive reporting for calendar events. Custom fields are created to contain additional company information that is not part of the standard company information or used in reports to define or separate companies.

To manage company custom fields, go to the [Manage Custom Fields](#) section for Administration Tools.

### 1.7.2 Import Contacts

Contacts can be imported from a Microsoft Excel spreadsheet (e.g. .xls format). Before you import the spreadsheet you must select what type of data the import file contains. You need to select the radio button to identify if the import file is a company or contact list import file.


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Once the selection is made as to how your import file is organized, press the Browse button to locate your contact import file.


A browse window will open and you must navigate to the folder where the file is located on your local computer or network. Select the file, and press Open.


The contact file is now attached, to go to Step 2 of the import wizard press Next.

 **Note:** If your import file has both company and contact information, choose the radio button where each row is a contact. When the import occurs, if the company already exists it on the list it will only import it once.

 **Note:** If you have contact information you wish to import that does not have a company or contact field you can create that field as a custom field.


 **Note:** Custom field values can also be included on the import file.

 **Note:** There is a limit of 500 rows (contacts/companies added), for system speed and efficiency.

 **Tip:** It is recommended you name each of the column headers in your import file to the same field name for the company or contact in e-Builder. By doing this, the fields will map automatically and save you time on Step 2 of the wizard.


In Step 2 of the import wizard, you can now map the standard and custom fields in e-Builder to your import file fields. For each field, press the drop-down arrow and select the column name on the import file. Once all of the fields are mapped correctly, press Next.


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 **Note:** If you choose Contacts as your import, you will also have mapping selections to perform for both Company and Contacts.


In Step 3 of the import wizard, you will see an import file summary and a preview of one of the contacts you imported. In the Import File Summary section, you will be able to see a summary status of your import file. These includes how many rows imported, how many had exceptions, and how many new companies and contacts were created. In the Preview, you will be able to see the import of one of the rows from your import file. This allows you to validate that the mapping was correct based upon the field mappings you performed in Step 2.


If there are any data issues with your import file that caused certain rows not to import, you will see a count of the rows with issues on the Exception tab. If you select the Exception tab, it will show you the row and the reason that row was not imported. You can Cancel the import, correct the file, and then re-import or continue the import with the errors. When you are satisfied with the import, press the Import button.

 **Note:** Custom field values can also be included on the import file.

 **Tip:** It is recommended that if your import file has exceptions to correct the exceptions you cancel the import. Once you cancel the import, correct the rows on the import files that had the errors and re-import the file.

The confirmation screen will appear informing you that the companies or contacts have now successfully imported. Press Finish to complete the import.

 **Note:** Press the Previous button to go to the previous step at any time during the import wizard.

 **Note:** Press the Cancel button to cancel the import at any time during the import wizard.

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## 1.8 Cost

The e-Builder Cost module provides accounts the ability to monitor, control and analyze cost items per project or in some cases, throughout the entire account. The Cost Administration Tools provide a central location to manage all of your project cost information. From here you can easily manage and control your funding sources, budgets, commitments, and actual cost information so that you can better ensure the financial success of your projects.

To reap optimum benefit from the Cost module, certain key items need to be configured. These range from the account codes to how the cost information will be viewed. Additionally, [user permissions](#) must also be set up front. In particular, the following settings need to be considered before the cost module can be operable.

- [Manage Cost Codes](#)
- [Establish Budget Change and Commitment Change Reason Codes](#)
- [Establish Commitment Types](#)
- [Create Cost Related Custom Fields](#)
- [Create Cost Templates](#)
- [Establish Funding Settings and Funding Categories](#)
- [Create and Customize Cost Summary Layouts](#)
- [Create and Customize Cost Mail Merge Templates](#)
- [Optionally, Set Forecasting Settings](#)
- [Assign Units of Measure](#)

### 1.8.1 Access Cost Settings

To access Cost settings:

1. Click the **Setup** link.
2. In the Administration Tools section, expand **Cost**. All Cost related settings display.

### 1.8.2 Access Cost Settings Page

To access the Cost Control Settings page:

1. Click the **Setup** link.


2. In the Administration Tools section, expand **Cost**.
3. Click **Cost Control Settings**.


### 1.8.3 Manage Account Codes

Account codes are used to categorize various cost items across all of the projects in the account. Each account code is associated with a specific line item in your budget so that you can manage and track commitments and actual costs against that budget line item. Account codes in the Cost module can consist of 1 to 6 segments.

The number of segments you choose to use will depend on the level of detail needed when tracking costs across your projects. The segments are important later in the process when you run reports to pull data from the cost manager system.


An account codes import feature is also available that allows you to quickly import the codes and their descriptions from an Excel® file. For more information, see [Import Account Codes](#). Once code options have been entered, you cannot edit the field length until all the options in the drop down list have been deleted.

 **Note:** Once an account code is in use on a project, additional segments cannot be enabled or removed. For this reason, it is important to give a lot of thought and consideration to your account code structure.

 **Tip:** If your implementation includes multiple project managers who manage a number of projects and they want to use their own codes, you can create a segment that is a free entry segment by leaving the Use Drop Down List check box clear. This enables each project manager to create their own codes as their specific project needs dictate.

Below are detailed descriptions of the fields located on the Manage Account Code page.

Field	Description
<b>Account Code Segment [number] Enabled</b>	Select this check box to enable the account code segment.
<b>Segment Name</b>	The segment names are used to identify what each segment in the account code represents. For example, the first

	<p>segment could be called “Category,” the second segment could be “Detail” and the third segment could be “Phase.”</p> <p>Each segment can be up to 20 alpha-numeric characters long. As an option, you can configure the segment to be a drop-down list by selecting the <b>Use Drop Down List</b> check box.</p>
<b>Length</b>	You can also assign the lengths of each segment. This refers to the maximum number of characters a particular segment can include.
<b>Separator Character</b>	Enter a character to separate the data between two or more segments. For example, you could enter a hyphen (-) or a comma (,) to help you identify codes more quickly, such as separating segments two through four, for instance.
<b>Display</b>	<p>This check box controls whether or not a segment is displayed in the user interface. For example, you may have the following sequence: CO-DO-E1, CO-DO-E2, CO-DO-E3, etc.</p> <p>You can choose to not display the second segment, so that your display would only show: CO-E1, CO-E2, CO-E3, etc.</p> <p>This check box can be selected or cleared at any time, but at least one segment must be displayed. Also, the segment must not be unique across all projects. With this check box selected, you can see a preview of what the account code will look like in the <b>Sample Budget Line Item</b> field. The account codes can be saved when all the segments have been defined and they are displayed in the desired format.</p> <p> <b>Note:</b> Once an account code is in use on a project, segments cannot be enabled or removed.</p>
<b>Use Drop Down List</b>	You can enable the drop down capability of a segment – this will give users a defined group of categories to select from.

	<p>Alternatively you can allow the segment information to be completed manually by leaving this check box clear.</p> <p><b>Tip:</b> If your implementation includes multiple project managers who manage a number of projects and they want to use their own codes, you can create a segment that is free entry by leaving this check box clear. This enables each project manager to create their own codes as their specific project needs dictate.</p> <p>If you select the <b>Use Drop Down List</b> check box, the <b>Drop Down List Options</b> field will become active, allowing you to enter the options to select for that segment. Clicking the <b>Edit Options</b> link opens the Account Code Segment Options window from which you are able to import account codes using a Microsoft Excel® spreadsheet. For more information, see, <a href="#">Import Account Codes</a>. Enter the code with the character length designated for that segment and a description of the code.</p>
<b>Drop-Down List Options</b>	This field is enabled only when the <b>Use Drop Down List</b> check box is selected. Enter drop-down list options in this field.

### 1.8.3.1 Import Account Codes

To import account codes:

1. Go to the Cost Settings. For more information, see [Access Cost Settings](#).
2. Click **Manage Account Codes**. The Manage Account Codes page displays.
3. Click the **Use Drop Down List** check box.
4. Click the **Edit Options** link. A warning message displays.
5. Click **OK**. The Cost Segment Options page displays.
6. Click **Import**.




7. Click **Browse...**
8. Search for and select the Microsoft Excel®(.xls) file you'd like to import.
9. Click **Next**.
10. Click the **Option** drop-down arrow and make a selection.
11. Click **Next**.
12. Click **Import**.

#### 1.8.4 Cost Settings Page Overview


Cost settings help you define how you want to manage the budget. The Cost module has varying degrees of control over the budget and commitments. These controls are limits that can be placed on budgets and commitments to avoid exceeding approved amounts.


A description of each setting on the Cost Settings page is located below.

 **Note:** When commitments, invoices, and budgets are added or changed, e-Builder performs cost control validations. See Cost Control Validations for more information.

<b>Controls Tab</b>	
<b>Field</b>	<b>Description</b>
<b>Save</b>	Click this button to save changes after settings have been configured.
<b>Select Default Budget Control Setting</b>	
<b>Uncontrolled</b>	<p>Select this option to configure an uncontrolled budget. This will allow commitments and general invoices to exceed the approved budget amount.</p> <p>If selected, this will be the default setting when users create a <i>new</i> budget on a project. To grant users the ability to change this default option, select the <b>Allow this setting to be changed on individual budgets</b> check box.</p>

	<p>These settings can be changed at any time to be less strict. Please be aware that once in use, you cannot go from an uncontrolled budget to controlled by total, for example, but you can go from controlled by total to uncontrolled.</p>
<b>Controlled Total</b>	<p>Select this option to prohibit commitments, general invoices and budget changes from exceeding the total approved budget amount.</p> <p>If selected, this will be the default setting when users create a <i>new</i> budget on a project. To grant users the ability to change this default option, select the <b>Allow this setting to be changed on individual budgets</b> check box.</p>
<b>Controlled By Line Item</b>	<p>Select this option to prohibit commitments, general invoices and budget changes from exceeding approved budget line item amounts.</p> <p>If selected, this will be the default setting when users create a <i>new</i> budget on a project. To grant users the ability to change this default option, select the <b>Allow this setting to be changed on individual budgets</b> check box.</p>
<b>Allow this setting to be changed on individual budgets</b>	<p>Select this check box to add some flexibility to any of the previously listed default budget control settings. This will give all users with Add/Edit permissions the option to override cost control settings for an individual project budget, should the need arise.</p>
<b>Allow a tolerance percentage on budget cost control validations</b>	<p>Select this check box to allow a certain percentage above the budget to be paid out before the cost control violation is triggered. When this option is enabled, users will not be able to approve commitments or invoices that exceed the budget tolerance. This feature may be necessary if it's an acceptable or common practice to pay on an invoice up to a certain percentage above the line item amount.</p> <p>Enter a default percentage in the <b>Budget Cost Control</b></p>

	<p><b>Tolerance</b> field. This percentage will act as a suggestion, as the tolerance can be changed by users before the budget is approved.</p> <p> <b>Note:</b> If this setting is disabled at any time, saved commitments and invoices will still honor the tolerance amount when approved.</p>
<b>Select Default Commitment Control Setting</b>	
<b>Uncontrolled</b>	Select this option to allow commitment invoices and commitment changes to exceed commitment amounts.
<b>Controlled Total</b>	Select this option to set restrictions based on total approved commitments. This will allow commitment invoices and commitment changes to exceed commitment line items, but not the total committed amount.
<b>Controlled By Line Item</b>	Select this option to add restrictions based on commitment line items. Commitment invoices and commitment changes will not be able to exceed approved commitment line item amounts.
<b>Allow this setting to be changed on individual commitments</b>	Select this check box to add some flexibility to any of the options selected above. This will give all users with Add/Edit permissions the option to override commitment control settings for an individual project budget, should the need arise.
<b>Allow a tolerance percentage on commitment cost control validations</b>	<p>Select this check box to allow a certain percentage above the commitment to be paid out before the cost control violation is triggered. This feature may be necessary if it's an acceptable or common practice to pay on an invoice up to a certain percentage above the line item amount.</p> <p>Enter a default percentage in the <b>Commitment Cost Control Tolerance</b> field. This percentage will act as a suggestion, as the tolerance can be changed by users when</p>

	<p>adding or editing a commitment. However, users will not be able to approve commitments or invoices that exceed the budget tolerance.</p> <p> <b>Note:</b> If this setting is disabled at any time, saved commitments will still honor the tolerance amount when the commitment is approved.</p>
<b>Settings Tab</b>	
<b>Field</b>	<b>Description</b>
<b>Miscellaneous Settings</b>	
<b>Allow users with add/edit budget permission to approve net \$0.00 budget changes</b>	<p>This check box is selected by default. If selected, users with add/edit budget permissions can approve zero-sum budget changes. If not selected, users need 'approve budget changes' permission to approve zero-sum changes.</p> <p>See <a href="#">Manage Permissions</a> for more information.</p>
<b>Allow users with add/edit commitment permission to approve net \$0.00 commitment changes</b>	<p>This check box is selected by default. If selected, users with add/edit commitment permissions can approve zero-sum commitment changes. If not selected, users need 'approve commit changes' permission to approve zero-sum changes.</p> <p>See <a href="#">Manage Permissions</a> for more information.</p>
<b>Auto-fill budget change numbers when adding budget changes</b>	<p>This check box is selected by default. If selected, budget change numbers auto-fill chronologically when adding budget changes, but these numbers can also be edited. If not selected, the budget change number has to be entered manually.</p>
<b>Auto-fill commitment numbers when</b>	<p>This check box is selected by default. If selected, commitment numbers auto-filled chronologically when adding commitments, but these numbers can also be</p>

<b>adding commitments</b>	edited. If not selected, the commitment number has to be entered manually.
<b>Auto-fill commitment change numbers when adding commitment changes</b>	This check box is selected by default. If selected, commitment change numbers auto-filled chronologically when adding commitment changes, but these numbers can also be edited. If not selected, the commitment change number has to be entered manually.
<b>Auto-fill invoice numbers when adding general/commitment invoices</b>	This check box is selected by default. If selected, invoice numbers auto-filled chronologically when adding invoices, but these numbers can also be edited. If not checked, the invoice number has to be entered manually.
<b>Notify users when approval requested</b>	Select this check box to send an email notification to all users with add/edit permissions, every time an approval is requested for a budget or commitment change. Permissions are based on specific cost entities such as Add/Edit Budget, Approve Final Budget etc. For more information, see <a href="#">Manage Permissions</a> .
<b>Allow users to create new company/contact when adding/editing invoices/commitments</b>	This check box is selected by default. If selected, users with add/edit contact permission are able to create new company and contacts while adding or editing invoices or commitments. For more information on user permissions, see <a href="#">Manage Permissions</a> .
<b>Allow users to close a commitment with unapproved commitment change(s),</b>	Select this check box to allow users with add/edit permission to close a commitment with unapproved commitment changes, unapproved commitment invoices, or a non-zero balance attached to the commitment.

<b>unapproved commitment invoices, or a non-zero balance</b>	
<b>Validate cost controls when requesting approval</b>	Select this check box to enforce <a href="#">cost control validations</a> when budget, budget changes, commitment, commitment changes and actual cost approvals are requested. If this check box remains clear, cost controls will not be validated until the item is approved. The benefit of choosing this option is that potential cost control violations will be caught earlier on; when the approval is requested, as opposed to when the item is being approved.
<b>Default Invoice Date Received</b>	Select this check box to default the invoice Date Received field to the present date (the date in which the invoice is being added to the system). You may or may not choose to default this date based on how invoices are processed in your organization. If this date is defaulted and invoices are typically processed at the end of each work week, for example, the invoice processor will have to be mindful of this and remember to change the default date. Conversely, if invoices are processed the same day they are received, having this date defaulted would be a convenience.
<b>Select Project Contact Settings</b>	
<b>Automatically add companies and contacts to project contacts when assigned to a commitment or invoice</b>	Select this radio button if you wish to have e-Builder automatically add companies/contacts to the project when they are assigned to an invoice or a commitment.
<b>Do not</b>	Select this radio button if you wish to not have the selected

<b>automatically add project contacts when committing or invoicing</b>	company/contact on a commitment/general invoice added to the project contacts list.
<b>Restrict Additional Scope Account Codes to Commitment:</b> <b>(Select roles/users to enforce restriction on)</b>	
<b>All Users</b>	Select this radio button to not allow users with commitment change permissions to add additional scope items to the commitment. Users can create a commitment change only for those items with the same account code.
<b>Selected roles</b>	Select this radio button to display roles to choose from. If selected, the All Roles box displays for you to choose selected roles that are allowed to add additional scope items to the commitment. Users can create a commitment change only for those items with the same account code.
<b>No Users</b>	Select this radio button to set no restrictions at all. If selected, anyone can add additional scope to the commitment.
<b>Attached Documents Default Upload Folder Settings</b>	
This section gives you the ability to set a default upload folder for documents attached to any of the cost entities listed below.	
<b>Budget</b>	Click <b>Browse</b> to set a default folder path for documents attached to the budget. This setting will apply to all projects. Select the <b>Allows users to place the file in a different folder</b> check box to allow team members to make a different folder selection at the time of upload. Click <b>Clear</b> to remove the folder path.
<b>Budget Change</b>	Click <b>Browse</b> to set a default folder path for documents attached to the budget change. This setting will apply to all

	<p>projects. Select the <b>Allows users to place the file in a different folder</b> check box to allows team members to make a different folder selection at the time of upload. Click <b>Clear</b> to remove the folder path.</p>
<b>Commitment</b>	<p>Click <b>Browse</b> to set a default folder path for documents attached to the commitment. This setting will apply to all projects. Select the <b>Allows users to place the file in a different folder</b> check box to allows team members to make a different folder selection at the time of upload. Click <b>Clear</b> to remove the folder path.</p>
<b>Commitment Change</b>	<p>Click <b>Browse</b> to set a default folder path for documents attached to the commitment change. This setting will apply to all projects. Select the <b>Allows users to place the file in a different folder</b> check box to allows team members to make a different folder selection at the time of upload. Click <b>Clear</b> to remove the folder path.</p>
<b>Commitment Invoice</b>	<p>Click <b>Browse</b> to set a default folder path for documents attached to the commitment invoice. This setting will apply to all projects. Select the <b>Allows users to place the file in a different folder</b> check box to allows team members to make a different folder selection at the time of upload. Click <b>Clear</b> to remove the folder path.</p>
<b>General Invoice</b>	<p>Click <b>Browse</b> to set a default folder path for documents attached to the general invoice. This setting will apply to all projects. Select the <b>Allows users to place the file in a different folder</b> check box to allows team members to make a different folder selection at the time of upload. Click <b>Clear</b> to remove the folder path.</p>
<b>Cash Flow</b>	<p>Click <b>Browse</b> to set a default folder path for documents attached to the cash flow. This setting will apply to all projects. Select the <b>Allows users to place the file in a</b></p>



	<b>different folder</b> check box to allows team members to make a different folder selection at the time of upload. Click <b>Clear</b> to remove the folder path.
<b>Funding Source</b>	Click <b>Browse</b> to set a default folder path for documents attached to the funding source. This setting will apply to all projects. Select the <b>Allows users to place the file in a different folder</b> check box to allows team members to make a different folder selection at the time of upload. Click <b>Clear</b> to remove the folder path.
<b>Forecasting</b>	Click <b>Browse</b> to set a default folder path for documents attached to the forecast. This setting will apply to all projects. Select the <b>Allows users to place the file in a different folder</b> check box to allows team members to make a different folder selection at the time of upload. Click <b>Clear</b> to remove the folder path.

### 1.8.5 Reason Codes

Budget/Commitment change reason codes are used to classify reasons behind commitment and budget changes. By simply viewing the reason code, users are able to identify the purpose of a change at a glance. Reason codes are used to categorize changes made to the budget or commitment after it has been approved. When adding reason codes to e-Builder, you will decided whether to apply the change to the current budget/commitment (this amount includes all approved changes) or to the original budget/commitment. This decision will affect the figures represented in the corresponding Financial Summary columns, the Quick Cost Summary and in cost-related reports.

Default reasons are available to help you get started, but you can also create your own set of change codes with nomenclature typically used on your projects, or both. The default codes are as follows:

- Design Change
- Error/Omission
- Field Condition
- Owner Directive

For more information and procedures on reason codes, the following topics are included in this section:

- [Manage Budget/Commitment Change Reason Codes](#)
- [Manage Change Reason Codes Page Overview](#)

#### 1.8.5.1 Working with Change Reason Codes

In managing reason codes, you are able to add, edit or delete new and existing reason codes. The 'Apply Approved Change To' allows you to choose whether the reason code will be applied to approved changes or to the original budget amount. For more information, see [Reason Codes](#).

The procedures below apply to both budget and commitment change reason codes. The following sections are included in this topic:

- [Use Default Budget/Commitment Change Reason Codes](#)
- [Add Budget/Commitment Change Reason Codes](#)
- [Edit Budget/Commitment Change Reason Codes](#)

To use default budget commitment change reason codes:

1. Go to the Cost settings. For more information, see [Access Cost Settings](#).
2. Expand **Reason Codes**.
3. Click **Budget Change** or **Commitment Change**. The Manage Budget/Commitment Change Reason Codes page displays.
4. Click **Use Defaults**.

To add new budget or commitment change reason codes:

1. Go to the Cost settings. For more information, see [Access Cost Settings](#).
  2. Expand **Reason Codes**.
  3. Click **Budget Change** or **Commitment Change**. The Manage Budget/Commitment Change Reason Codes page displays.
  4. In the **Reason Code** field, enter the name of the new reason code.
  5. Click the **Apply Approved Change To** drop-down arrow and make a selection.
-

6. Enter a description in the **Description** field.
7. Click **Save**.

To edit budget or commitment change reason codes:



You have the ability to modify reason code names, description or to which change the code will apply; whether approved budget changes or to the original budget.

1. Go to the Cost settings. For more information, see [Access Cost Settings](#).
2. Click **Reason Codes**.
3. Click **Budget Change** or **Commitment Change**. The Manage Budget/Commitment Change Reason Codes page displays.
4. Click the **Edit** link located to the left of the item you want to modify. The fields of the selected item become editable.
5. Make any of the following changes:
  - Change the name of the code in the Code field.
  - Change the description of the code in the Description field.
  - Click the drop-down arrow in the Applies To column and select either Approved Change or Original Amount.
6. Click **Save**.

#### 1.8.5.2 Manage Change Reason Codes Page Overview

Field	Description
<b>Add New Reason Code</b>	
<b>Save (Button)</b>	Click this button to save added reason.
<b>Cancel</b>	Click this button to disregard changes. Unsaved changes will be lost.

<b>Reason Code</b>	Enter the name of the new reason code in this field.
<b>Apply Approved Change To</b>	Click this drop-down arrow to select what the commitment reason code will be applied to; whether to the Original Amount or to Approved Changes.
<b>Description</b>	Enter a description of the commitment change reason code in this field.
<b>Allow only net \$0 changes</b>	<p>This setting pertains to allowances. Select this check box if the reason for the commitment change may only result in a \$-0- dollar net change to the contract.</p> <p>For example: If the allowance agreed to is \$100,000, but the contractor then indicates to the owner that he finds it will cost \$128,000 to do the work, e-Builder will display a validation when the commitment change is entered. Based on this example, if this check box is selected, the dollar amount of the commitment change may not exceed \$100,000.00; because the net total of the change must equal \$0 in order for the change to be approved. This rule applies for both changing and approving commitment items.</p> <p>If this restriction is checked, the total shown when adding or editing a commitment will be shown in red if the net amount is not -0-.</p> <p>Below is a sample of the message that displays if for example an Administrator attempted to approve the disbursement of an amount that is more than the allowance item amount:</p>

	
<p><b>Allowance reason code</b></p>	<p>Select this check box to indicate that the change to the commitment involves an allowance. An allowance is an estimated amount of funds set aside for a particular item – allowances do not include a detailed cost breakdown, and most importantly, cannot be charged against.</p> <p><b>Example:</b> Charges might be set aside as an allowance item if for instance, a project is four years from completion and figures for FF&amp;E (furniture, fixtures and equipment) could not be determined yet, because it's impossible to foresee what the latest furniture and equipment will be, or the cost of these items, so far in advance. This commitment could then be an allowance item in order to set money aside until the project nears completion.</p> <p>Once this check box is selected, the 'Limit change items to same account code as allowance item' check box displays.</p>
<p><b>Limit change items to same account code as allowance item</b></p>	<p>This check box displays when the 'Allowance reason code' check box is selected.</p> <p>Select this check box to indicate that the change to the commitment must be made to the same account code as the allowance item. For example, if the allowance item was flooring, and the account code for flooring was 01-3.0117, then selecting this option will require that the commitment change be made to that same account code.</p> <p> <b>Note:</b> Allowances cannot be selected as a change item.</p>

<b>Reason Codes Section</b>	
<b>Edit</b>	Click this link to enter edit mode and modify commitment change reason code details. All fields for the selected row become editable.
<b>Delete (Link)</b>	Click this link to delete the reason code located on the selected row.
<b>Save (Link)</b>	This link displays next to the Edit link when a reason code is in edit mode. Click this link to save changes for the selected reason code.
<b>Code</b>	This field displays the name of the commitment change reason code. In edit mode the name can be changed from this field.
<b>Description</b>	This field displays the description of the commitment change reason code. In edit mode the description can be changed from this field.
<b>Applies To</b>	This field displays whether the commitment change reason code applies to approved changes or to the original amount. Click the Edit link to change this setting.
<b>Net \$0</b>	<p>A check mark in this field indicates that the commitment change reason code allows only net \$0 changes. Click the Edit link to change this setting.</p> <p>Select this check box if the reason for the commitment change may only result in a \$-0- dollar net change to the contract.</p> <p>For example: If the allowance agreed to is \$100,000, but the contractor then indicates to the owner that he finds it will cost \$128,000 to do the work, e-Builder will display a validation when the commitment change is entered. Based on this example, if this check box is selected, the dollar amount of the commitment change may not exceed \$100,000.00; because the net total of the change must equal \$0 in order for the change to be approved. This</p>

	rule applies for both changing and approving commitment items.
<b>Allowance</b>	<p>A check mark in this field indicates that the commitment change reason code applies to allowances. Click the Edit link to change this setting.</p> <p>An allowance is an estimated amount of funds set aside for a particular item – allowances do not include a detailed cost breakdown.</p>
<b>Limit Items</b>	A check mark in this field indicates that the commitment change reason code applies to an allowance and has to use the same account code as the allowance item. This check box can only be selected if the Allowance check box is selected. Click the Edit link to change this setting.
<b>Delete (Button)</b>	Click this button to delete a reason code after respective check boxes have been selected.

## 1.8.6 Commitment Types

Having commitment types is a way to group the different kinds of commitments used on your projects. They are also used for reporting purposes. The commitment type is assigned whenever a new commitment is entered into e-Builder. In working with commitment types, you can create new ones, edit or delete existing ones. The following topics are included in this section:

- [Manage Commitment Types Page Overview](#)
- [Working with Commitment Types](#)
- [About the Payment Application](#)

### 1.8.6.1 Manage Commitment Types Page Overview

The following is an overview of the Manage Commitment Types page. A detailed description of the fields and buttons located on this page are located in the table below.

Field	Description
-------	-------------

<b>Add New Commitment Types</b>	
<b>Save</b>	Click this button to save added commitment types.
<b>Cancel</b>	Click this button to disregard changes. Unsaved changes will be lost.
<b>Commitment Type</b>	Enter the name of the commitment type in this field.
<b>Description</b>	Enter a description of the commitment type in this field.
<b>Use Pay Application</b>	Select this check box to enable the <a href="#">payment application feature</a> .
<b>Commitment Types</b>	
<b>Edit</b>	Click this link to enter edit mode and modify commitment type details. All fields for the selected row become editable.
<b>Delete (Link)</b>	Click this link to delete the commitment type located on the selected row.
<b>Save (Link)</b>	This link displays next to the Edit link when a commitment type is in edit mode. Click this link to save changes for the selected commitment type.
<b>Code</b>	This field displays the name of the commitment type. In edit mode the name can be changed from this field.
<b>Description</b>	This field displays the description of the commitment type. In edit mode the description can be changed from this field.
<b>Use Pay Application</b>	A check mark in this field indicates that the commitment type is flagged as a payment application commitment. Click the Edit link to make changes. For more information about the payment application feature, see <a href="#">About the Payment Application</a> .



<b>Delete (Button)</b>	Click this button to delete one or more commitment types at a time. Select the check mark next to the commitment type(s) that you want to delete, and then click this button.
------------------------	---

### 1.8.6.2 Working with Commitment Types

In working with commitment types, you can create new ones, edit or delete existing ones. The following sections are included in this topic:

- [Add Commitment Types](#)
- [Edit Commitment Types](#)

To Add Commitment Types:

1. Go to the Cost settings. For more information, see [Access Cost Settings](#).
2. Click **Commitment Types**. The Manage Commitment Types page displays.
3. In the **Commitment Type** field, enter the name of the new commitment type.
4. Enter a description in the **Description** field.
5. Indicate whether or not this commitment type will use the pay application by selecting the **Use Pay Application** check box or leaving it blank. For more information on the Pay App, see [About the Payment Application](#).
6. Click **Save**.

To Edit Commitment Types:

Editing a commitment type that is already in use will effectively update the commitment code on all commitments using the commitment type. Also, if a commitment type is already using the pay application and it is in use, you cannot clear the Use Pay Application check box.

1. Go to the Cost settings. For more information, see [Access Cost Settings](#).
2. Click **Commitment Types**. The Manage Commitment Types page displays.
3. Click the **Edit** link located to the left of the item you want to modify. The

fields of the selected item become editable.

4. Make any of the following changes:

- Change the name of the commitment type in the Code field.
- Change the description of the commitment type in the Description field.
- If applicable, select the Use Pay Application check box. For more information on the Pay Application, see [About the Payment Application](#).

5. Click **Save**.

### 1.8.6.3 About the Payment Application


e-Builder’s application for payment feature supports widely used standards for processing invoices. By [flagging commitment types](#) to use the payment application functionality, pay app specific columns become available while processing an application for payment (commitment invoice) throughout the Cost and Processes modules. The Application for Payment feature is a fit for clients who already use or want to start using industry standard invoice processing. Additionally, clients may choose to enable the payment application to take advantage of the schedule of values download and import capabilities.

The table below includes a description of the columns on the payment application as they display for commitment invoices:

Invoice Items													Download Schedule of Values Worksheet.xls		Import Invoice Items		Manage Funding	
A	B		C		D	E	F	G	H		I	J	K	L	M			
Commitment Item #	Description of Work	Budget Code with Description	Funding Rule	Scheduled Value	Work in Place From Previous Application(s)	This Period	Total Materials Presently Stored	Current Payment Due This Period	Total Completed and Stored To Date (D + E + F)	% (G / C)	Balance to Finish (C - G)	Retainage Release Amount	Retained This Period	Amount Less Retainage	Cumulative Retainage			
001	Legal / SEA Fees	04 - Legal / SEA Fees	Atlanta Legis	500.00	0.00	0.00	0.00	0.00	0.00	0.00%	500.00	0.00	0.00	0.00	-550.00			
<b>Total</b>				500.00	0.00	0.00	0.00	0.00	0.00	0.00%	500.00	0.00	0.00	0.00	-550.00			

Column Name	Description
A - Commitment Item #	This column displays the commitment number.
B - Description of Work	This column displays the description of work for the respective commitment line item.
Budget Code with Description	This column displays the budget code and description of the budget line item that the commitment is associated with.

Funding Rule	This column displays the funding rule used for the commitment invoice. Click the drop-down arrow to make a selection if an option is not populated. Action cannot be taken on a commitment invoice (Request Approval, Approve, Mark as Paid etc.) if a funding rule is not selected.
C - Scheduled Value	This column displays the amount of the commitment item.
D - Work in Place from Previous Application(s)	This column displays the total approved invoice amount from previous payment applications for work in place excluding any previously stored material.
E – This Period	This column displays the amount of work in place for this period.
F – Total Materials Presently Stored	This column displays the net materials store, which is the materials stored from previous payment applications and newly delivered items awaiting payment for this period.
G – Total Completed and Stored to Date (D+E+F)	This column displays the amount of work completed and stored to date, which is the sum of work in place from previous payment applications, the amount of work in place for this period and the total amount of material stored to date, including newly delivered items awaiting payment.
H - % (G/C)	This column displays the total amount of materials completed and stored divided by the commitment amount.
I – Balance to Finish (C-G)	This column displays the remaining balance.
J – Retainage Release Amount	This column displays the amount of remaining retainage.

Retained This Period	This column displays the invoice amount retained for this period
Amount Less Retainage	This column displays the net invoice amount due for payment for this period
K – Cumulative Retainage	This column displays the cumulative retainage amount for all previous payment applications.
Edit Invoice Custom Fields Icon (  )	Click this icon to add or modify invoice item custom fields.

### 1.8.7 Cost Custom Fields

Cost custom fields are definable fields that drive reporting for cost items. Custom fields are created to contain additional cost information that is not part of the standard cost data or used in reports to define or separate cost information.

Within the Cost module, custom fields exist for the following components, which are located throughout the module:

- Budget
- Budget Line Item
- Budget Change
- Commitment
- Commitment Change
- Invoice
- Funding Source
- Cash Flow

Custom fields for each of these items are added in the same way. Follow the steps below to add Cost-related custom fields.

1. Click the **Setup** link.
2. In the **Administration Tools** section, click **Cost**.
3. Click **Custom Fields**, and then select the respective cost area you'd like to add custom fields to.
4. Click **Add Field**. The Add Custom Field page displays.
5. Select a data type radio button, and then click **Next**.
6. Enter all required fields, and then click **Next**.

7. Click **Save** to complete the process or **Save & Add** to add more fields.

### 1.8.7.1 About Commitment Item Custom Fields

Custom fields in e-Builder are definable fields that drive the reporting needs of an organization. Custom fields allow administrators to group, filter, or categorize information according to specific business processes. Specifically, commitment line item custom fields (CLICF) allow you to define account-specific values at the individual line item level for commitments/commitment changes and commitment invoices. These custom fields are supported in mail merge, reporting, and imports.

#### End User Experience

In the user interface, commitment item custom fields can be completed when users are adding commitments, adding commitment line items, or editing commitment details. If you make these fields required for your users, they will not be able to save commitments until custom fields are entered.

#### Display Options

In order for users to see these custom fields on their respective tables in the user interface (Commitment Items, Commitment Changes, and Actual Costs), you must configure display options. If display options are not configured, users will still be able to complete these fields in add/edit mode, but the custom fields will not be viewable on their respective tables.

Related Topics:

- [Define Commitment Item Custom Fields](#)
- [Configure Display Options for Commitment Item Custom Fields](#)


#### 1.8.7.1.1 Define Commitment Item Custom Fields

To define commitment item custom fields:

1. Go Cost Settings. For instructions, see [Access Cost Settings](#).
2. Click **Custom Fields**.
3. Click **Commitment Items**.



4. Click **Custom Fields**. The Commitment Item Custom Fields page displays.
5. Click **Add Field**.
6. Select the data type and click **Next**.
7. Enter required fields then click **Next**.
8. Review the field summary for accuracy. If you need to make corrections, click **Previous**. Otherwise, click **Save** or **Save & Add**.

 **Note:** Custom fields will not display on the appropriate tables unless you [configure the display options](#).

#### Related Topics:

- [About Commitment Item Custom Fields](#)
- [Configure Display Options for Commitment Item Custom Fields](#)

#### 1.8.7.1.2 Configure Display Options for Commitment Item Custom Fields

Display Options allow administrators to specify how custom fields will display for commitments/commitment changes and commitment invoices. If display options are not configured for commitment custom fields, users will still be able to complete these fields in add/edit mode, but the custom fields will not display on their respective tables in the user interface (Commitment Items, Commitment Changes, and Actual Costs).

Original Commitment Amount	Current Commitment	Projected Commitment	Current Retainage Held	Actuals Approved	Project Phase	Department	Custom Field(s)
50,000.00	50,000.00	50,000.00	0.00	0.00	Design	Legal	
50,000.00	50,000.00	50,000.00	0.00	0.00			

To configure display options:

1. Go to Cost Settings. For instructions, see [Access Cost Settings](#).
2. Click **Custom Fields**.
3. Click **Commitment Items**.



4. Click **Display Options**. The Commitment Item Custom Field Display Options page displays.
5. Select the **Display Field** check box in the Commitments/Commitment Changes section and the Commitment Invoices section for each custom field you want to display in the user interface.

Commitment Item Custom Field Display Options						
Commitment Item Custom Field Name	Commitments/Commitment Changes		Subtotal Field	Commitment Invoices		Subtotal Field
	Display Field	Display Order		Display Field	Display Order	
Department	<input checked="" type="checkbox"/>	2		<input checked="" type="checkbox"/>	1	
Project Phase	<input checked="" type="checkbox"/>	1		<input checked="" type="checkbox"/>	2	


6. In the Display Order column, determine the order in which custom fields will

appear in a table using whole numbers, starting with 1.

7. Click **Save**.

### 1.8.7.2 About Invoice Item Custom Fields

Custom fields in e-Builder are definable fields that drive the reporting needs of an organization. Custom fields allow users to group, filter, or categorize information according to specific business processes and custom fields are also be available for invoice line items. This feature allows you to define account-specific values at the individual line item level. These custom fields are supported in mail merge, reporting, and imports.

In the user interface, invoice item custom fields are added by clicking the add invoice custom field icon () located on the far right of the invoice items table on the Add/Edit Commitment Invoice page and the Add/Edit General Invoice page. If you make these fields required for your users, they will not be able to save invoices until these fields are added.

Invoice item custom field layouts are available and allow you to display these custom fields on the Invoice Details page. For more information, see [Configure Invoice Item Custom Field Layouts](#).

Related Topics:

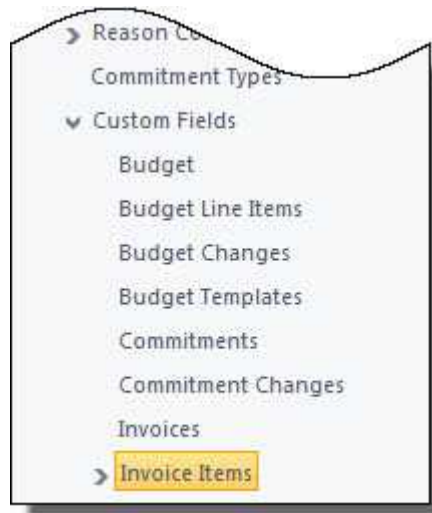
- [Define Invoice Item Custom Fields](#)

#### 1.8.7.2.1 Define Invoice Item Custom Fields

To define invoice item custom fields:

1. Go to the Administration Tools.
  2. Click **Cost**.
  3. Click **Custom Fields**.
-






4. Click **Invoice Items**. The Invoice Item Custom Fields page displays.
5. Click **Add Field**.
6. Select the data type and click **Next**.
7. At a minimum, enter all required fields then click **Next**.
8. Review the field summary for accuracy. If you need to make corrections, click **Previous**. Otherwise, click **Save** or **Save & Add**.

#### Related Topics:

- [About Invoice Item Custom Fields](#)
- [Manage Invoice Layouts](#)

#### 1.8.7.2.2 Configure Invoice Item Custom Field Layouts

The Manage Invoice Layouts options allow you to specify which custom fields, if any will display on the Invoice Items table located on the Invoice Details page. If an invoice item custom field is not on an invoice layout, it will not display on the Invoice Items table, but will still be accessible by clicking the 'view invoice custom field icon' (.

The image below illustrates the view of the interface in the Cost module for both

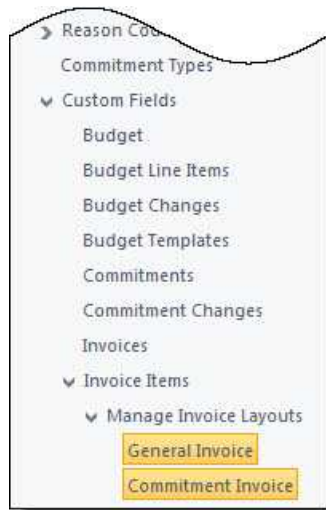
options:

Retained Date	Remaining To Be Invoiced	Amount This Invoice	Retained This Invoice	Department	Project Phase
5,000.00	0.00	50,000.00	5,000.00	Legal	Phase One
5,000.00	0.00	50,000.00	5,000.00		

Cost Summary | Commitment Details | Invoices For This Company

To manage invoice layouts:

1. Go to the Administration Tools.
2. Click **Cost**.
3. Click **Custom Fields**.
4. Expand Invoice Items.



5. Click **General Invoice** to create a custom field layout for general invoices.

Or

Click **Commitment Invoice** to create a custom field layout for commitment

invoices.

6. In the **All Fields** section, select the custom fields you want to add to the layout.
7. Click **Add**.
8. Click **Save**.

## 1.8.8 Cost Templates

Cost templates allow you to prepare various cost data for the finance department, project managers and other responsible parties to use in the interface. Templates are a great way to save time and ensure information integrity. The following topic headings are located in this section:

- [Budget Templates](#)
- [Cash Flow Templates](#)
- [Funding Templates](#)

### 1.8.8.1 Budget Templates

Budget templates allow you to pre-load budget line items for project managers to use when creating their budgets. Creating budget templates has many benefits that include saving time, being able to reuse and modify budget line items when necessary, reducing the margin for error and speeding up the budget creation process for the project manager. Additionally, you can leverage the budget template to add cash flow templates. For more information on cash flow templates, see [Cash Flow Templates](#).

The topics listed below will help guide you when working with budget templates:

- [Access Budget Template Page](#)
- [Working with Budget Templates](#)
- [Import Budget Template Line Items](#)
- [Add/Edit Template Line Item Formulas](#)

Related Topics:

- [Customize Template with Field Mappings](#)
  - [Mail Merge Templates](#)
-

## 1.8.8.1.1 Access Budget Template Page

To access the Budget Template page:

1. Go to the Cost settings. For more information, see [Access Cost Settings](#).
2. Click **Templates**.
3. Click **Budget**. The Budget Templates page displays.

## 1.8.8.1.2 Working with Budget Templates

Budgets can be created and saved as templates; this allows users to get a project budget up and running quickly. The project manager will then update the necessary fields and activate the budget. The following tasks will help you work with budget templates:

- [Add Budget Templates](#)
- [Edit Budget Template Details](#)
- [Copy Budget Templates](#)

## Add Budget Templates

To add budget templates:

1. Go to the Budget Template page. For more information see [Access Budget Template Page](#).
  2. Click **Add**.
  3. Enter the name of the template in the **Name** field.
  4. In the **Status** field, choose either the Active or Draft radio button.
  5. Optionally, take any of the following actions:
    - Enter a description in the **Description** field.
    - Click the **Segment To Override When Applied** drop-down arrow to select a segment to override, if any, when the template is applied.
  6. Click **Save**. The Budget Template Details page displays.
-

You can continue to [edit the budget template](#), or close out of this window to add or import template line items later.

## Edit Budget Templates

After a budget template has been created, you can edit just the details of the template, such as the name, status, description and formula. In addition, you can further modify the entire template by adding or importing line items. Below is a procedure that takes you through doing either, from the Budget Template Details Page. For a full description of all the fields located on this page, see [Budget Template Details Page Overview](#).

To edit budget templates:

1. Go to the Budget Template page. For more information see [Access Budget Template Page](#).
2. Click the name of the template you want to modify. The [Edit Budget Template page](#) displays.
3. Click **Edit Details** to edit any of the following details:
  - Template Name
  - Status
  - Description
  - Budget Line Items Details

Or

Add template line items by doing the following:

4. Enter an account code in the **Account Code** field.
5. Enter a description for the budget template in the **Description** field.
6. Click **Add**.
7. Optionally, you can also take any of the following actions from this page:
  - [Add/Edit Template Line Item Formulas](#)
  - [Import Budget Template Line Items](#)
  - Delete Budget line items

## Copy Budget Templates

If you copy a template e-Builder gives you the ability to save it with a different name. This is a great method to employ if you have a similar template to create that may have slight differences. This saves time and keeps you from having to create a brand new template from scratch.

To copy budget templates:

1. Go to the Budget Template page. For more information see [Access Budget Templates Page](#).
2. Click the **Copy** link. The Budget Template Details page displays.
3. Make any of the following changes:
  - Enter a new name in the **Name** field.
  - Change the status of the template.
  - Enter a new description in the **Description** field.
4. Click **Save**.

For steps on adding or modifying budget line items, see [edit budget templates](#).

### 1.8.8.1.3 Import Budget Template Line Items


Importing budget template line items allows you to import budget line items into your project, saving you the trouble of creating a new budget template manually, each time. In this way, you can reuse templates, making changes when and where necessary. Please note that the template is created ahead of time and in this step you are simply importing the line items as opposed to adding line items one by one. For information on creating a new budget template, see [Working with Budget Templates](#).

To import budget template line items:

1. Go to the Budget Templates page. For more information see [Access Budget Templates Page](#).
  2. Click the name of the template you want to import line items for. The Edit
-

Budget Template page displays.

3. Click **Import**.
4. Click **Browse**. Search for and select the .xls file to attach.

 **Note:** Only Microsoft Excel® 97-2003 (.xls) files are supported.

5. Click **Next**. The Import Line Items for [Template Name] – Field Mappings page displays.
6. Enter all required fields. For a detailed description of the fields located on this page, see [Import Line Items - Field Mappings Page Overview](#).
7. Click **Next**. The Import Line Items – Review page displays with a preview of the import file. All exceptions display on the Exceptions tab for you to see any errors that may have occurred during import.
8. If the import was successful, click **Save**.

Or

If there are exceptions that need to be addressed, make corrections on the import file and repeat this procedure.

#### 1.8.8.1.4 Add/Edit Budget Template Line Item Formulas

You are able to create and add formulas per budget line item into the details of your budget template. Formulas might include numbers from other line items or project custom fields into the equation. For example, if you wanted to calculate your construction cost to be the estimated square footage multiplied by the cost per square foot, you could add two project custom fields in the equation to automatically calculate that number for you. Or, you might want to calculate the design fees to be a percentage of the total construction cost; in this case you could build a formula in which you pull in the construction line item and multiply that by a percentage.

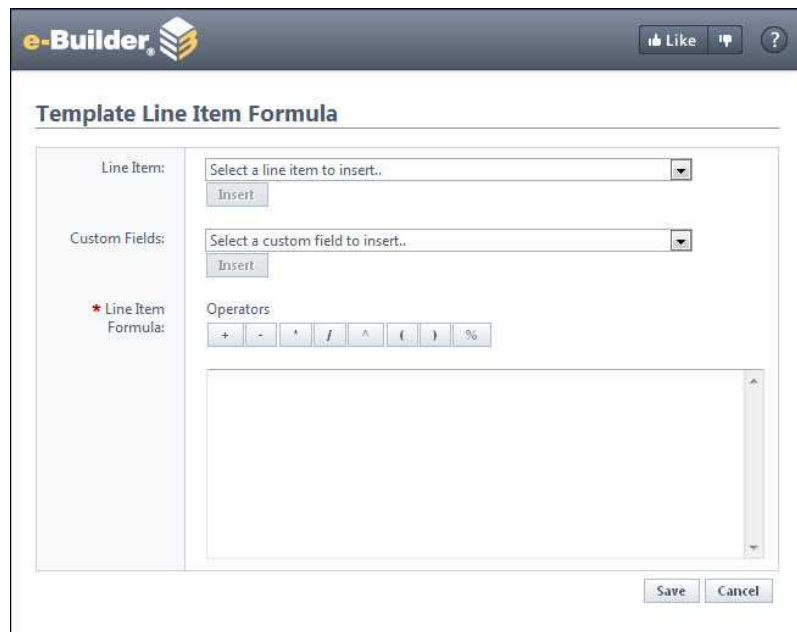
The following instructions are provided below:

- [Add Budget Template Line Item Formulas](#)
- [Edit Budget Template Line Item Formulas](#)

## Add Budget Template Line Item Formulas

To add a formula for a budget line item in your budget template:

1. Go to the Budget Templates page. For more information see [Access Budget Templates Page](#).
2. Click the name of the template you want to add formulas to. The Edit Budget Template page displays.
3. Click **New**. The Template Line Item Formula dialog box displays.



The screenshot shows the 'e-Builder' logo in the top left corner of the dialog box. In the top right corner, there are three icons: a thumbs up 'Like' button, a thumbs down button, and a question mark help icon. The main title of the dialog is 'Template Line Item Formula'. On the left side, there is a vertical sidebar with three sections: 'Line Item:', 'Custom Fields:', and '\* Line Item Formula:'. The 'Line Item:' section has a dropdown menu with the text 'Select a line item to insert..' and an 'Insert' button below it. The 'Custom Fields:' section has a dropdown menu with the text 'Select a custom field to insert..' and an 'Insert' button below it. The '\* Line Item Formula:' section has a row of 'Operators' with buttons for '+', '-', '^', '/', '^', '(', ')', and '%'. Below the operators is a large, empty text area for entering the formula. At the bottom right of the dialog, there are 'Save' and 'Cancel' buttons.


4. Click the **Line Item** or **Custom Fields** drop-down arrow to make a selection, and then click **Insert** to add this item to the Line Item Formula box.
5. In the **Operators** section, select an applicable operator. This selection displays in the Line Item Formula box.
6. Click the **Line Item** or **Custom Fields** drop-down arrow to make a selection, and then click **Insert** to add this item to the Line Item Formula box.
7. After all elements of the formula have been configured, click **Save**.

## Edit Budget Template Line Item Formulas



To edit a formula for a budget line item in your budget template:

1. Go to the Budget Templates page. For more information see [Access Budget Templates Page](#).
2. Click the **Edit** link located left of the template name. The Edit Budget Template page displays.
3. In the **Budget Template Line Items** section, click the **Edit** link in the Formula section. The Template Line Item Formula dialog box displays for you to make changes to the formula.
4. Click **Save** after all modifications are made.

 **Note:** If the budget template includes Budget Segment Overrides, the configurable field will be disabled. For more information on the budget segment override setting, see [Add Budget Template Page Overview](#).

#### 1.8.8.1.5 Budget Template Overview Pages

##### 1.8.8.1.5.1 Budget Template Page Overview

The Budget Templates page lists all the account templates, including filtering capabilities and some basic controls and information. You can filter by template name, status or custom field, if configured. Filtering helps you narrow down to the templates that display in the results table. Below is an overview of the fields and buttons located on this page.


Field	Description
<b>Filter Templates</b>	
<b>Name</b>	Enter the name of the template(s) you want to filter for in this field.
<b>Status</b>	Click this drop-down arrow to select a status to filter by.
<b>Custom Fields</b>	Click this drop-down arrow to select a custom field to filter by. You can also type custom field keywords to filter by.

<b>Filter</b>	Click this button to filter by entered criteria.
<b>Budget Templates</b>	
<b>Add</b>	Click this button to add a budget template. For detailed steps, see <a href="#">Working with Budget Templates</a> .
<b>Copy</b>	Click this button to copy a budget template. For detailed steps, see <a href="#">Working with Budget Templates</a> .
<b>Delete</b>	Click this button to delete selected templates.

#### 1.8.8.1.5.2 Budget Template Details Page Overview

The Budget Template Details page appears after a new budget template has been created. In edit mode, this page is titled, the Edit Budget Template page. You can also access this page by clicking the name of the template. From this page you can edit budget template details, import or add line items, add formulas and do a general update of the template. Below is a detailed description of every field and button located on this page.

<b>Field</b>	<b>Description</b>
<b>Budget Template Details</b>	
<b>Edit Details</b>	Click this button to edit the details of the template, such as the name, status, description and any existing budget template line items.
<b>Cancel</b>	Click this button to exit this page. All unsaved data will be lost.
<b>Name</b>	This field lists the name of the budget template. Click Edit Details to make modifications.
<b>Status</b>	This field lists the current status of the budget template. Click Edit Details to make modifications. Available statuses are Draft

	and Active. In active mode users who can create budgets have the ability to apply this template to a project. If the Status is Draft, the template will not be available to apply to a project.
<b>Created</b>	This field displays the date and name of the user that created the template.
<b>Last Modified</b>	This field displays the date and name of the user that last modified the template.
<b>Description</b>	This field displays the description of the template. Click <b>Edit Details</b> to modify.
<b>Add Template Line Item</b>	
<b>Add</b>	Click this button to add a line item to the template after its details have been entered, at a minimum, in the Account Code and Description fields.
<b>Clear</b>	Click this button to clear data fields in this section.
<b>Account Code</b>	<p>Enter the account code of the budget line item in this field. If account codes have already been configured on the account, a 'Select a value...' drop-down arrow displays with a list of available account codes for you to choose from.</p> <p> <b>Note:</b> If your account codes are more than one level, you will have a selection for each level when you add a budget line item.</p> <p>For more information on creating account codes, see <a href="#">Manage Account Codes</a>.</p>
<b>Cost Code</b>	Enter the cost code of the budget line item in this field. If cost codes have already been configured on the account, a 'Select a value...' drop-down arrow displays with a list of available cost codes for you to choose from.


	For more information on creating cost codes, see <a href="#">Manage Account Codes</a> .
<b>Description</b>	Enter a description for the budget line item in this field.
<b>Formula</b>	<p>Click New to open the Template Line Item Formula page and add a line item formula. Line item formulas is a great way to automatically populate cost data based on formulas added here.</p> <p>For example, if you wanted to calculate your construction cost to be the estimated square footage multiplied by the cost per square foot, you could add two project custom fields in the equation to automatically calculate that number. Or, you might want to calculate the design fees to be a percentage of the total construction cost; in this case you could build a formula in which you pull in the construction line item and multiple that by a percentage.</p> <p>For steps on creating a budget template line item formula, see <a href="#">Add/Edit Template Line Item Formulas</a>.</p>
<b>Allow Charges</b>	This check box is selected by default. When selected, users are able to add a dollar amount to commitment changes, commitments and general invoices. Otherwise, funds are not able to be applied.
<b>Template Line Item Custom Fields</b>	
If custom fields exist on the account for budget line items, you would complete the field here. For more information on creating template line item custom fields, see <a href="#">Cost Custom Fields</a> .	
<b>Budget Template Line Items</b>	
This section lists all existing line items. Controls are available that allow you to add or import line items, sort and edit line items.	
<b>Group By</b>	Click this drop-down arrow to choose whether to group this list

	by line item, category or cost codes. These viewing options are most beneficial when there is a long list of line items available.
<b>Delete</b>	Click this button to delete line items after corresponding check boxes have been selected. You can select multiple line items at a time.
<b>Import</b>	Click this button to import an .xls file of budget line items.
<b>Edit</b>	Click this link to edit the details of a selected line item.
<b>Budget Template Custom Fields</b>	
If custom fields exist for the budget template, you would complete the fields here. For more information on creating budget template custom fields, see <a href="#">Managing Custom Fields</a> .	

#### 1.8.8.1.5.3 Add Budget Template Page Overview

This page displays when you click the Add button on the [Budget Templates page](#) and is used to add new budget templates to the account. Below are detailed descriptions of the fields and buttons located on the page.

Field	Description
<b>Save</b>	Click this button to save the details of the new budget template.
<b>Cancel</b>	Click this button to return to the Budget Templates page and cancel any changes you may have made. All unsaved changes will be lost.
<b>Name</b>	Enter a name for the new budget template in this field.
<b>Status</b>	Choose a status radio button. Active will make the template available for use. Draft will keep the template from displaying for users to utilize. You can also go back and make this template

	active one completed. See Edit Budget Templates for more information.
<b>Description</b>	Enter a description for the new budget template.
<b>Segment to Override When Applied</b>	<p>Click this drop-down arrow to make a specific account code segment user entry at the time the budget template is being applied. This setting requires the user to select from available segments before applying the template. This setting is beneficial to have if a budget template is required where a particular segment(s) (e.g. category, cost code etc.) are not defined upfront, but can be determined at the time the template will be applied.</p> <p>When this setting is configured, users will see the following message when applying the template.</p>  <p>Account code segments are configured in the <a href="#">Manage Account Code</a> section of the Cost Setup. These configurations are usually set at the start of setting up cost data because once an account code structure is in place and are being used, it cannot be changed. Cost code segments are defined by you, the account administrator, and available segments display in this drop-down arrow.</p>

#### 1.8.8.1.5.4 Edit Budget Template Page Overview

From this page you are able make changes to the details of the budget template and also to any formulas and custom fields that might exist. Below is a detailed description of every field and button located on this page.

Field	Description
<b>Save</b>	Click this button to save your changes.
<b>Cancel</b>	Click this button to return to previous page and cancel any changes you may have made. All unsaved changes will be lost.
<b>Name</b>	Enter the name of the template in this field.
<b>Status</b>	Set the status of the template by selecting either the Active or Draft radio buttons. Active templates are automatically available for use and draft templates are not available in the user interface.
<b>Description</b>	Enter a description for the template in this field.
<b>Segment To Override When Applied</b>	<p>If there are cost code segments that are configured to be overridden in this template, then this field displays along with the name of the segment that is being overridden. For more information on this feature, see <a href="#">Add Budget Template Page Overview</a> – Segment to Override field description.</p> <p>You will notice that the overridden segment displays as xxx in the line item column located in the Budget Template Line Item section below this field.</p>
<b>Budget Template Line Items</b>	This section displays all available budget line items in this template. The Description and Allow Charges fields can be modified. To make changes to formulas, click the Edit link. For more information, see <a href="#">Add/Edit Line Item Formula</a> .
<b>Budget Template Custom Fields</b>	If available, budget template custom fields display in this section and can be modified.

## 1.8.8.1.5.5 Import Line Items – Field Mappings Page Overview

The Import Line Items – Field Mappings page displays as part of the import wizard while importing budget template line items. A full description of the fields located on this page display below:

Field	Description
<b>Previous</b>	Click this button to return to the previous page and edit the budget template file.
<b>Next</b>	Click this button after all desired fields have been entered and you are ready to progress to the next step in the import process.
<b>Cancel</b>	Click this button to close this page and return to the Budget Template Details page. All unsaved data will be lost.
<b>Cost</b>	Click this drop-down arrow to choose a cost entity to base this template on.
<b>Description</b>	Click this drop-down arrow to map a description.
<b>Allow Charges</b>	Click this drop-down arrow to map where charges should be allowed.

## 1.8.8.1.5.6 Import Line Items – Review Page Overview

The Import Line Items – Review page displays as the last page of the import wizard while importing budget template line items. A full description of the fields located on this page is located below:

Field	Description
<b>Previous</b>	This button displays if the import was not successful. Click this button to return to the previous page and edit field mappings.
<b>Save</b>	This button only displays for successful imports. Click this button to



	save the file import.
<b>Cancel</b>	Click this button to close this page and return to the Budget Template Details page. All unsaved data will be lost.
<b>Import File Summary</b>	
<b>File Name</b>	This field displays the name of the imported file.
<b>Rows in File</b>	This field displays the amount of data rows in the imported file.
<b>Rows To Be Imported</b>	This field displays the number of rows that remain to be imported.
<b>Rows With Exceptions</b>	This field displays the number of rows in the spreadsheet that have exceptions. Exceptions are data rows that did not merge properly. Details of these errors are located on the Exceptions tab.
<b>Preview Tab</b>	
<b>Account Code</b>	This field displays the account code.
<b>Description</b>	This field displays the description of the line items as entered in the previous step.
<b>Allow Charges</b>	This field displays the cost entity chosen to allow charges for as entered in the previous step.
<b>Exceptions Tab</b>	
The Exceptions tab displays any errors that occurred during the import. If there are any exceptions, you cannot continue with the import; the 'Import' button will be grayed out. You must go back to the imported sheet and correct what is wrong.	
<b>Export</b>	Click this button to export exceptions data to a Microsoft Excel <sup>®</sup>

<b>Exceptions</b>	spreadsheet.
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### 1.8.8.2 Cash Flow Templates

Cash flows can be created and saved as templates. By creating a cash flow template, users are able to apply the template to a project budget using the apply template functionality and have a project's cash flow up and running quickly. The project manager will then update the necessary fields. Cash flow templates are based primarily on budget templates. For more information on adding budget templates, see [Working with Budget Templates](#). The cash flow templates feature also allows you to incorporate schedule templates, which gives you the ability to link budget line items to project schedules or master tasks.

The following topics are included in this section:

- [Access Cash Flow Templates Page](#)
- [Working with Cash Flow Templates](#)
- [Cash Flow Template Overview Pages](#)
  - [Cash Flow Template Page Overview](#)
  - [Add Cash Flow Template Page Overview](#)

#### 1.8.8.2.1 Access Cash Flow Templates Page

To access the Cash Flow Templates page:

1. Go to the Cost settings. For more information, see [Access Cost Settings](#).
2. Click **Templates**.
3. Click **Cash Flow**. The Cash Flow Templates page displays.

#### 1.8.8.2.2 Working with Cash Flow Templates

The following tasks will help you work with cash flow templates:

- [Add Cash Flow Templates](#)
- [Edit Cash Flow Templates](#)
- [Copy Cash Flow Templates](#)

### Add Cash Flow Templates


A template is a predefined pattern that you can use as the basis for setting up a project. Cash flow templates are based on selected budget template line items. You

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also have the option to link to schedule templates in order to link budget line items to a project schedule or to [master tasks](#).

To add cash flow templates:

1. Go to the Cash Flow Template page. For more information see [Access Cash Flow Templates Page](#).
2. Click **Add**.
3. In the **Name** field, enter a name for the template.
4. Select the **Active** check box to make the template available to users.
5. In the **Description** field, enter the description of the template.
6. Click the **Budget Template** drop-down arrow and select a budget template that has line items included to set up the cash flow for.
7. Click the **Schedule Template** drop-down arrow to select a schedule template for the ability to link the cash flow line items to master tasks.
8. In the **Setup Cash Flow** section, take the following actions:
  - Click the **Cash Flow Curve** drop-down arrow for each line item to set the cash flow.
  - Click the **Schedule Link Type** drop-down arrow for each line item to choose what to link the schedule to.
  - In the **Payment Lag** field, enter the payment lag in days.

 **Note:** For a detailed description of the fields located on this page, see [Add Cash Flow Template Page Overview](#).

9. Click **Save**.

### Edit Cash Flow Templates

After a cash flow template has been created, you can edit just the details of the template, such as the name, active/ non-active status and description. In addition,

you can also modify the entire template by changing the budget or schedule template that the cash flow template is based on. For a detailed description of the fields located on this page, see [Add Cash Flow Template Page Overview](#). Below is a procedure for editing the cash flow template.

To edit cash flow templates:


1. Go to the Cash Flow Template page. For more information see [Access Cash Flow Template Page](#).
  2. Click the name of the template you want to modify. The Edit Cash Flow Template page displays.
  3. To modify the details of the cash flow template, make any of the following changes:
    - Modify the name of the template in the **Name** field.
    - Select or clear the **Active** check box. Active templates are available for use, inactive templates are not.
    - Edit the **description** of the template.
    - Click the **Budget Template** drop-down arrow and select a different budget template to base this cash flow template one. This will change the budget line items in the table below.
    - Click the **Schedule Template** drop-down arrow to select a different schedule template to base this cash flow template on. This will allow you to link budget line items to different master tasks.
  4. Click the **Cash Flow Curve** drop-down arrow to change the cash flow curve.
  5. Click the **Schedule Link Type** drop-down arrow to change what the cash flow curve is linked to.
  6. If the cash flow curve is linked to a task, you can click the task drop-down arrow to modify the master task that the curve is linked to.
  7. Enter a description for the budget template in the **Description** field.
  8. Click **Save**.
-

## Copy Cash Flow Templates

If you copy a template, e-Builder gives you the ability to save it with a different name. This is great if you have another template you need to create that may be similar, with only slight differences. This saves time and keeps you from having to create a brand new template from scratch.

To copy cash flow templates:

1. Go to Cash Flow Template page. For more information see [Access Cash Flow Template Page](#).
2. Click the **Copy** link. The Add Cash Flow Template page displays.
3. In the **Name** field, enter a name for the template.
4. Select or clear the **Active** check box. Active templates are available for use, inactive templates are not.
5. In the **Description** field, enter the description of the template.
6. Click the **Budget Template** drop-down arrow and select a budget template that has line items included to set up the cash flow for.
7. Click the **Schedule Template** drop-down arrow to select a schedule template for the ability to link the cash flow line items to master tasks.
8. In the **Setup Cash Flow** section, take the following actions:
  - Click the **Cash Flow Curve** drop-down arrow for each line item to set the cash flow.
  - Click the **Schedule Link Type** drop-down arrow for each line item to choose what to link the schedule to.
  - In the **Payment Lag** field, enter the payment lag in days.

 **Note:** For a detailed description of the fields located on this page, see [Add Cash Flow Template Page Overview](#).

9. Click **Save**.

## 1.8.8.2.3 Cash Flow Template Overview Pages

This section includes an overview of the pages encountered throughout the cash flow template section in the administration tools section of e-Builder. The following topics are included:

- [Cash Flow Template Page Overview](#)
- [Add Cash Flow Template Page Overview](#)

## 1.8.8.2.3.1 Cash Flow Template Page Overview

The Cash Flow template page is the first to display when accessing cash flow templates. This page lists all existing templates on the account and controls for adding, modifying, copying and deleting templates are also available. A filter allows you to narrow your search for templates in case multiple templates exist for the account. Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Filter Templates</b>	
<b>Name</b>	Enter the name of the template(s) you want to filter for in this field.
<b>Status</b>	Click this drop-down arrow to choose a status to filter templates by.
<b>Filter</b>	Click this button to filter by the criteria you've entered.
<b>Cash Flow Templates</b>	
<b>Add</b>	Click this button to add a cash flow template. For detailed steps, see <a href="#">Working with Cash Flow Templates</a> .
<b>Copy</b>	Select the check box next to the template you want to copy. Click this button to copy a cash flow template. For detailed steps, see <a href="#">Working with Cash Flow Templates</a> .
<b>Delete</b>	Select the check box next to the template you want to delete. Click this button to delete a cash flow template. For detailed steps, see <a href="#">Working with Cash Flow Templates</a> .

<b>Edit</b>	Click this link to modify the selected template. The edit functionality allows you to modify cash flow details as well as change the budget or schedule template the cash flow is based on. For detailed steps, see <a href="#">Working with Cash Flow Templates</a> .
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#### 1.8.8.2.3.2 Add Cash Flow Template Page Overview

The Add Cash Flow Template page displays when you click the Add button on the Cash Flow Template page. This page allows you to add additional cash flow templates to the account. Below are detailed descriptions of each field and button. For steps on adding cash flow templates, see [Working with Cash Flow Templates](#).

Field	Description
<b>Cash Flow Template Details</b>	
<b>Save</b>	Click this button to save changes to the cash flow template.
<b>Cancel</b>	Click this button to exit this page and return to the Cash Flow Templates page. All unsaved changes will be lost.
<b>Name</b>	Enter a name for the template in this field.
<b>Is Active</b>	Select this check box to activate the template. This makes the template available for use in the Cost module. If the template is still a draft, it's best to leave this check box empty so that no one can use it. Once ready, you can always activate the template later; see <a href="#">Working with Cash Flow Templates</a> for detailed steps.
<b>Description</b>	Enter a description of the cash flow template in this field.
<b>Budget Template</b>	Click this drop-down arrow to select a budget template to set cash flow curves for.
<b>Schedule Template</b>	Click this drop-down arrow to select a schedule template. Doing so allows you to link budget line items to project schedules or

	master tasks.
<b>Setup Cash Flow</b>	
<b>Line Item</b>	This field displays the budget line item number as it displays on the budget template.
<b>Description</b>	This field displays the description of the budget line item as it displays on the budget template.
<b>Cash Flow Curve</b>	<p>Click this drop-down arrow to select a cash flow curve for the budget line items. Choose from the following options:</p> <ul style="list-style-type: none"> <li>• Manual</li> <li>• Linear</li> <li>• Bell Curve</li> <li>• Inverse Bell Curve</li> <li>• S Curve</li> <li>• Inverse S Curve</li> </ul> <p>For more information on cash flow curves, see Cash Flow Curves.</p>
<b>Schedule Link Type</b>	<p>Click this drop-down arrow to select a schedule link type to link the schedule to. Choose from the following options:</p> <ul style="list-style-type: none"> <li>• Link To Project</li> <li>• Link To Schedule (This option only displays if a schedule template is selected.)</li> <li>• Link To Task (This option only displays if a schedule template is selected.) An additional drop-down arrow displays (Task) allowing you to select master tasks to link the schedule to.</li> </ul>
<b>Payment Lag (In Days)</b>	Enter the number of days that a payment should be delayed. This measure allows you to track when the check is written and has been submitted to the vendor.



### 1.8.8.3 Funding Templates

Funding templates help you associate funding sources and categories ahead of time for the finance team or project managers to use while adding funding sources in the user interface. These templates help save time and it eliminates the need for users to choose categories each time a funding source is added to the project. If sources and categories are known ahead of time and especially if you anticipate there will be a number of sources and categories, funding templates can be a great resource. Multiple templates can be created and tailored for specific uses.

The following topics are included in this section:

- [Access Funding Templates Page](#)
- [Working with Funding Templates](#)

#### 1.8.8.3.1 Access the Funding Template Page

To access the Funding Templates page:

1. Click **Setup**.
2. In the **Administration Tools** menu, expand **Cost**.
3. Expand **Templates**, and then click **Funding**. The Funding Templates page displays.

#### 1.8.8.3.2 Working with Funding Templates

The following tasks will help you work with funding templates:

- [Add Funding Templates](#)
- [Add Funding Sources to Funding Templates](#)
- [Copy Funding Templates](#)
- [Edit Funding Templates](#)
- [Delete Funding Templates](#)

### Add Funding Templates


1. Go to the Funding Template Page. For instructions, see [Access the Funding Template Page](#).
2. Click **Add**.

3. Enter a name for the template in the **Name** field.
4. Select the **Is Active** check box to make this template available for use.

### Add Funding Sources to a Funding Template

This is step 2 of 2 in creating a funding template. After the template has been added, you can then add funding sources to it. If funding is enabled on the account, you will be required to select a funding category when adding funding sources to the template.

1. Go to the Funding Template Page. For instructions, see [Access the Funding Template Page](#).
2. Click the **Edit** link located left of the target template.
3. In the **Setup Funding Sources** section, click **Add**.
4. In the **Name** field, enter the name of the funding source.
5. Click the **Funding Category** drop-down arrow and select a funding category.
6. Click **Save**. The Funding Template Details page displays.

 **Note:** The newly added funding source is listed in the Setup Funding Sources section.

7. Click **Save**.

### Copy Funding Templates

1. Go to the Funding Template Page. For instructions, see [Access the Funding Template Page](#).
2. Click the **Copy** link located left of the template you want to copy.
3. Modify the name of the template in the **Name** field.
4. Click **Save**.

### Edit Funding Templates

1. Go to the Funding Template Page. For instructions, see [Access the Funding Template Page](#).
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2. Click the **Edit** link located left of the template you want to edit.
3. Make any of the following modifications:
  - Change template name in the **Name** field.
  - Select the **Is Active** checkbox to make template Active/Inactive.
  - If applicable, change/add funding sources.
4. Click **Save**.

### Delete Funding Templates

1. Go to the Funding Template Page. For instructions, see [Access the Funding Template Page](#).
2. Click the checkbox next to the template(s) you want to delete.
3. Click **Delete**. You are prompted for confirmation.
4. Click **Continue**.

## 1.8.9 Funding

Funding sources allow you to establish where funds are being endowed for budget line items, commitments and/or invoices. The funding section of the Cost module enables you to set up how the funding features will operate in the user interface. Funding settings let you determine the level of restrictions you wish to place on budget, commitment and actual cost funding. Once funding is enabled for a particular component, e-Builder prompts users to make a selection before adding a budget line item, processing a commitment or invoice to ensure consistent usage throughout the life of the project. Enabling funding on a project offers visibility into total, used and remaining project funds per funding source. Used conjointly with [funding cost controls](#), you can ensure that you do not budget, commit or spend more than is available in any given funding source. From this section you can also set up your funding categories, by which to group funding sources.

In e-Builder, funding sources are added through the user interface in the Cost module. By default, a funding source is always required when processing invoices. If enabled for commitments and budget line items, users are required to make funding source selections before commitments can be processed and budget line items can be saved.

The following topics are located in this section:

- [Funding Settings](#)
  - [Access Funding Setup Options](#)
  - [Funding Settings Overview](#)
  - [Edit Funding Settings](#)
- [Funding Categories](#)
  - [Working with Funding Categories](#)

### 1.8.9.1 Funding Settings

Funding settings can be configured to be as rigid or as flexible as necessary. Configure the account to include or exclude funding for budgets and/or commitments. Funding controls are part of these settings and help you ensure you do not over commit or spend your funding sources. These funding controls offer more security and supports agile funding practices.

The following topics are included in this section:

- [Access Funding Setup Options](#)
- [Funding Settings Overview](#)
- [Edit Funding Settings](#)

Related Topics:

- [Funding](#)

#### 1.8.9.1.1 Access Funding Setup Options

To access funding setup options:

1. Click **Setup**.
2. In the **Administration Tools** menu, expand **Cost**.
3. Click **Funding**. All of the funding setting options display.

#### 1.8.9.1.2 Edit Funding Settings

If funding is enabled on the account, funding settings should be configured to coincide with the goals of your cost management process. These settings allow you to determine the levels at which funding sources should be specified: budget level, commitment level, invoice level, or all. Furthermore, you can tighten or loosen restrictions by deciding whether or not commitments and actuals can exceed

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funding sources, how remaining funds should be allocated and whether or not settings can be overridden at the account level. Some settings can be edited at any time, but other are a one-time configuration that cannot be changed. For details on each option, see [Funding Settings Page Overview](#).

To edit funding settings:

1. Go to the Funding Setup Options. For instructions, see [Access Funding Setup Options](#).
2. Click the **Settings** link. The Enable Advanced Funding page displays.
3. Click **Edit**.
4. Select the check box next to the funding options you want to enable/disable. For a description of each funding setting, see [Funding Settings](#).
  - **Budgets:** *Enable Funding on Budgets:* Select to enforce the selection of funding sources when budget line items are added.
  - **Commitments:**
    - *Enable Funding on Commitments:* Select to enforce the selection of funding sources when commitments line items are added.
    - *Do Not Allow Committed Amounts to Exceed Funding Source Amounts:* Select to trigger a violation message when a proposed commitment will exceed the funds available in the selected funding sources. This will prevent the commitment from being saved.
    - *Commitment Funding Restrictions can be overridden at the Project Level:* Select to allow users with Add/Edit Commit permission to override these restrictions at the project level.
  - **Actual Costs:**
    - *Enable Funding on Actual Costs:* When funding is enabled, this setting is enabled by default and cannot be altered. A funding source must always be determined when entering actual costs into the system.
    - *Do Not Allow Actual Costs to Exceed Funding Source Amounts:* Select to trigger a violation message when a proposed invoice will exceed the funds available in the selected funding sources. This will prevent the invoice from being saved.


- *Actuals Funding Restrictions can be overridden at the Project Level:* Select to allow users with Add/Edit Actuals permission to override these restrictions at the project level.

- **Auto Allocate Funding Remainder:**

- *Auto Allocate Remaining Funding: Distribute Remaining Funding to Last Funding Source:* When the funding distribution feature is used to distribute funds from funding sources, there may be an amount that remains due to rounding. When this check box is selected, the remaining funds will automatically be added to the last funding source listed. Otherwise, this amount will have to be distributed manually.



5. Click **Save**.


#### 1.8.9.1.3 Funding Settings Page Overview

 **Note:** Once funding is enabled, it cannot be disabled.

If funding is enabled on the account, users will be required to select funding source(s) when entering budget line items, approving budget changes, adding commitments and/or invoices, depending on the settings that are configured on this page. There are also additional settings available that allow you to tighten or loosen these restrictions. For instructions, see [Edit Funding Settings](#).

The table below provides a description of each available setting.

Funding Options	Description
<p><b>Budgets:</b></p> <ul style="list-style-type: none"> <li>• Enable Funding on Budgets</li> </ul>	<p> <b>Note:</b> Once enabled, this setting cannot be disabled.</p> <p>Select this check box to require the selection of funding sources when a budget line item is added.</p> <p>For instructions, see <a href="#">Edit Funding Settings</a>.</p>
<p><b>Commitments:</b></p> <ul style="list-style-type: none"> <li>• Enable Funding on</li> </ul>	<p> <b>Note:</b> Once enabled, this setting cannot be disabled.</p>

<p>Commitments</p> <ul style="list-style-type: none"> <li>• Do Not Allow Committed Amounts to Exceed Funding Source Amounts.</li> <li>• Commitment funding restrictions can be overridden at the project level.</li> </ul>	<p>Select this check box to require the selection of funding sources when a commitment line item is selected. If this check box is selected, additional committed amount settings display.</p> <p>This option displays when funding is enabled for commitments. Select this check box if you do not want commitments to exceed the amount available in funding sources. If users enter a commitment amount that exceed funding available in the funding source, a validation message displays and user will have to enter an amount less than or equal to available funds in the funding source.</p> <p>This option displays when funding is enabled for commitments. Select this check box to give users with Add/Edit Commitment permissions the ability to override commitment funding restrictions for individual projects.</p> <p>For instructions, see <a href="#">Edit Funding Settings</a>.</p>
<p><b>Actual Costs:</b></p> <ul style="list-style-type: none"> <li>• Enable Funding on Actual Costs</li> <li>• Do Not Allow Actual Costs to Exceed Funding Source Amounts.</li> </ul>	<p> <b>Note:</b> Once enabled, this setting cannot be disabled.</p> <p>When funding is enabled, this setting is enabled by default and cannot be altered. A funding source must always be determined when entering actual costs into the system.</p> <p>Select this check box to restrict actual costs (invoiced items) from exceeding amounts that are available in the funding source associated to</p>

<ul style="list-style-type: none"> <li>Actuals Funding restrictions can be overridden at the project level</li> </ul>	<p>the actual cost.</p> <p>Select this check box to give users with Add/Edit permissions the ability to override actual cost funding restrictions for individual projects.</p> <p>For instructions, see <a href="#">Edit Funding Settings</a>.</p>
<p><b>Auto Allocate Funding Remainder</b></p>	<p>When the funding distribution feature is used to distribute funds from funding sources, there may be an amount that remains due to rounding. When this check box is selected, the remaining funds will automatically be added to the last funding source listed. Otherwise, this amount will have to be distributed manually.</p>

### 1.8.9.2 Funding Categories

Funding categories give context to funding sources and groups them based on similar attributes. Funding categories can be used in a number of ways to best suit the needs of your organization. If grouped by intent, your categories might mirror eventual contracts such as fees, design costs, contracts, etc. If used in this manner and project managers are not familiar with the different funding sources, simply knowing the intent of funds will allow them to choose the correct category. This method also reinforces consistent terminology throughout different areas of the project, including bid categories; mitigating confusion and establishing clarity early on in the project life cycle.

Related Topics:

- [Working with Funding Categories](#)
- [Funding](#)

#### 1.8.9.2.1 Working with Funding Categories

Funding categories offer consistency across projects. Additionally, reports can be generated on rolled up categories across projects for increased visibility.

Funding categories can be modified the following ways:



- [Add Funding Categories](#)
- [Edit Funding Categories](#)
- [Delete Funding Categories](#)

## Add Funding Categories

To add funding categories:

1. Go to the Funding Setup Options. For more information, see [Access Funding Setup Options](#).
2. Click the **Categories** link. The Funding Categories page displays.
3. In the **Category** field, enter the funding category name.
4. Click **Add**. The new category displays in the Categories table.

## Edit Funding Categories

Editing funding categories allow you to modify category name and/or description.

To edit funding categories:

1. Go to the Funding Setup Options. For more information, see [Access Funding Setup Options](#).
2. Click the **Categories** link. The Funding Categories page displays.
3. Click the **Edit** link located next to the funding category you want to edit. The page displays in edit mode.
4. Edit category name and/or description.
5. Click the **Save** link located next to the category name.

## Delete Funding Categories

Funding categories that are being used in a funding template or in a project's cost funding source cannot be deleted. You will receive an error message if you attempt to delete categories that are currently being used.

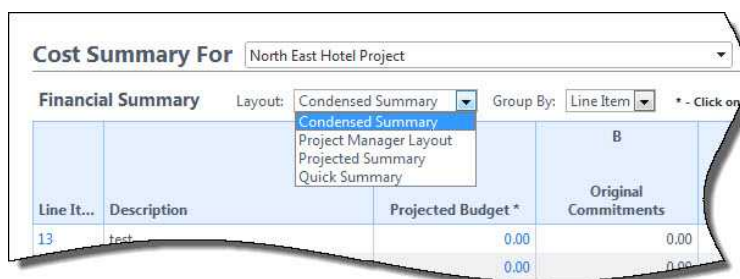
To delete funding categories:

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1. Go to the Funding Setup Options. For more information, see [Access Funding Setup Options](#).
2. Click the **Categories** link. The Funding Categories page displays.
3. Click the checkbox(es) located next to the funding category you want to delete.
4. Click **Delete**. You are prompted for confirmation.
5. Click **OK**.

### 1.8.10 Cost Summary Layouts

Cost summary layouts help you determine the columns that display on the Project Cost Summary page in the user interface. By default, all available cost summary columns display. Custom layouts benefit users by allowing them to view only the information that is pertinent to them with the option of viewing additional information when necessary. Consolidating this information facilitates reporting, viewing, and tracking. Multiple layouts can be created to serve different purposes. Once a layout is created, it becomes the default display. If multiple layouts exist on the account, a 'Layout' drop-down arrow appears in the user interface for users to choose from.



From this section of the setup you are able to manage cost summary layouts by creating new ones, editing existing ones or deleting unwanted layouts. Columns can be color coded with thresholds set to provide users with a visual indication of what the data columns represent. You can customize the layout to show only those columns that are most often used. For example, a cost summary layout can be created showing only the "Commitment" columns, in which "Budget" and "Actuals" columns are hidden.

The following topics are included in this section:

- [Access Manage Cost Summary Layouts Page](#)
- [Add Cost Summary Layouts](#)
- [Color Code Cost Summary Layouts](#)
- [Set Cost Summary Threshold Values](#)


#### 1.8.10.1 Access Manage Cost Summary Layouts Page

To access the Manage Cost Summary Layouts Page:

1. Click **Setup**.
2. In the **Administration Tools** menu, expand **Cost**.
3. Expand **Cost Summary**.
4. Click **Cost Summary Layouts**.

#### 1.8.10.2 Add Cost Summary Layouts

If multiple layouts exist on the account, a 'Layout' drop-down arrow displays in the user interface for users to choose from.

 **Tip:** Give cost summary layouts descriptive names so it's easy for users to discern the best layouts for the information they want to view.


To add cost summary layouts:

1. Go to the Manage Cost Summary Layouts page. For more information, see [Access Manage Cost Summary Layouts Page](#).
2. Click **Add**. The Manage Cost Summary Columns page displays.

3. In the **Layout Name** field, enter a name for the layout.
4. Select the column you want in your layout in the **All Columns** section, and then click **Add**. The selected column displays in the adjacent **Selected Columns** box.
5. Repeat step 4 for each column you want to add to the layout.
6. Use the controls located on the far right of the page (**Top, Up, Down, Bottom**) to order the columns how you want them to appear in the user interface.
7. Click **Save**.

### 1.8.10.3 Color Code Cost Summary Layouts


Color coding can help specific sets of information stand out at a glance. If there are information sets that are more important to a user than others, color coding those columns helps users quickly and easily identify this information.

 **Note:** To set color codes only and not thresholds ensure that the Enable Threshold check box for each specific column is clear. For more information on setting thresholds, see [Set Cost Summary Threshold Values](#).

To set color codes for cost summary layouts:

1. Go to the Manage Cost Code Summary page. For more information, see [Access Manage Cost Code Summary Page](#).

2. Click the **Color Codes** link located left of the Layout name. The **Color Codes** page displays.
3. Select the checkbox next to the column(s) you wish to color code.

 **Note:** The row must be checked to enable color coding.

4. In the **Apply To** column, select **Text** or **Background**.
5. Click the **Low Range Color** drop-down list and choose a color for that column.
6. To continue coding for all columns - those that are not in the selected layout - click the **Show all columns** check box located toward the top of the page, and then repeat steps 3-5.
7. Click **Save**.


If you'd like to add threshold values, see [Set Cost Summary Threshold Values](#).


#### 1.8.10.4 Set Cost Summary Threshold Values

Setting thresholds is another way to identify important sets of information, but thresholds differ from simple color coding because it allows you to assign minimum, mid range, and high range numerical values for each budget line item. Color codes are assigned to each threshold value to serve as a visual indicator when budget line items have reached or exceeded certain thresholds. Thresholds have to be enabled in order to display on the Project Cost Summary page of the user interface. Enable the threshold feature by selecting the Enable Threshold check box located toward the top of the page. This feature can be disabled at any time.

#### Example:

Threshold values might be set for the approved budget changes. The column may display in green if the value is zero and displays in red if the value is a number greater than zero. This way, the owner can see at a glance the number of budget changes that have been approved and how many have not.

 **Tip:** So that you can easily monitor the over/under budget variance, it is recommended that you set it so that if you are over budget, the text or background is red. This way if you go over budget, you will know at a glance and can take corrective action.

 **Note:** The following rules apply to color code settings:

- If not enabled, the entire column will be the low range color.
- Negative and positive decimal numbers are acceptable values.
- The Show all columns checkbox (when checked) will show all columns available in the cost summary. Those columns not configured for the current layout will not be able to be configured.

To set cost summary threshold values:

1. Go to the Manage Cost Code Summary page. For more information, see [Access Manage Cost Code Summary Page](#).
2. Click the **Color Codes** link located left of the Layout name. The **Color Codes** page displays.
3. Select the **Enable Threshold** check box located in the header. Threshold drop-down arrows display with empty fields into which you can enter numeric values.



<input checked="" type="checkbox"/> Column Name	Apply To	<input checked="" type="checkbox"/> Enable Threshold	Low Range Color	Low-Mid Threshold	Mid Range Color	Mid-High Threshold	High Range Color
<input checked="" type="checkbox"/> Projected Budget	<input type="radio"/> Text <input type="radio"/> Background	<input type="checkbox"/>	Default				
<input checked="" type="checkbox"/> Original Commitments	<input type="radio"/> Text <input type="radio"/> Background	<input type="checkbox"/>	Default				
<input checked="" type="checkbox"/> Non Commitment Costs	<input type="radio"/> Text <input type="radio"/> Background	<input checked="" type="checkbox"/>	Green	60,000.00	Yellow	180,000.00	Red
<input checked="" type="checkbox"/> Current Commitments	<input type="radio"/> Text <input type="radio"/> Background	<input checked="" type="checkbox"/>	Green	50,000.00	Yellow	100,000.00	Red
<input checked="" type="checkbox"/> Projected Commitment Changes	<input type="radio"/> Text <input type="radio"/> Background	<input checked="" type="checkbox"/>	Green	30,000.00	Yellow	100,000.00	Red
<input checked="" type="checkbox"/> Forecasted Commitments	<input type="radio"/> Text <input type="radio"/> Background	<input checked="" type="checkbox"/>	Green	40,000.00	Yellow	100,000.00	Red


Note:  
 1. Color coding will be enabled only for checked rows.  
 2. For enabled rows, please enter at least one threshold value.  
 3. Low-mid threshold value must be less than or equal to the mid-high threshold value.

4. Enter the threshold numerical values and select a color code for each value.
5. To continue coding for all columns - those that are not in the selected layout - click the **Show all columns** check box located toward the top of the page. All cost summary columns display.
6. Click **Save**.

### 1.8.11 Dynamic Cost Management

Dynamic cost management refers to functionality in e-Builder that includes dynamic cost columns and dynamic cost processes. Both features can be used conjointly or independent of each other. They provide the ability to create, track,

and maintain cost data that is not necessarily part of the budget, commitments or actuals.

 **Note:** Dynamic cost management is an optional feature that must be enabled by e-Builder support at no additional charge. For further inquiries, please contact our support team.

Additional information and configuration steps for dynamic cost columns and dynamic cost processes are provided in this section:

- [About Dynamic Cost Columns](#)
- [About Dynamic Cost Processes](#)
- [Add Dynamic Cost Columns](#)
- [Configuring Dynamic Cost Processes](#)
- [Invoice Monthly Daily Reports](#)

### 1.8.11.1 About Dynamic Cost Columns

Dynamic cost columns are combinations of existing cost data formulated to provide specific cost information. This gives you the ability to track and store data outside of the standard e-Builder cost process data, such as subcontractor expenditures, or capturing different iterations of the budget approval process, should your approval process occur in stages. Essentially, you can create your own cost information and rename the columns as you see fit. You can also pull these columns into different e-Builder reports. These additional columns display in your cost sheet (project cost summary). To access them, click the 'Other Cost Columns' link located in the Cost Menu of the user interface.




#### Suggested Use


Because dynamic cost columns are completely customizable, the ways in which you can use them are endless. Below are a couple of examples to help you get started:


- A formula can be created to provide the difference between the current budget and current commitment to obtain the remaining budget amount.
- Another, more sophisticated way you might choose to use dynamic cost

columns is to create a set of three risk exposure columns. For instance, if you had a risk process with line items that represent the dollar amounts associated with those risks, and these risks had different statuses associated with them, you could pull cost data based on these statuses (i.e. pending) into a column in your cost summary; this would be the first column (potential risks). The second would be the default Estimate at Completion column. And the third could be a combination of the two (Estimate at Completion plus Potential Risks). Visibility into these potential risks will give you the opportunity to lessen the impact of, or circumvent liabilities all together.

### Important Things to Note

 **Note:** In order for dynamic cost columns to display in the Cost Summary, the column must be added to one or more of the layouts. For more information, see [Add Cost Summary Layouts](#).

 **Note:** Once added to the Cost Summary, dynamic cost columns are distinguished by the tooltip that displays when you hover over the column name; the tooltip displays the formula used to create the column

 **Note:** Renamed dynamic cost columns will only display as you've named them on the Cost Summary and in reports; these columns will not display in any other area of the product.

Related Topics:

- [Add Dynamic Cost Columns](#)

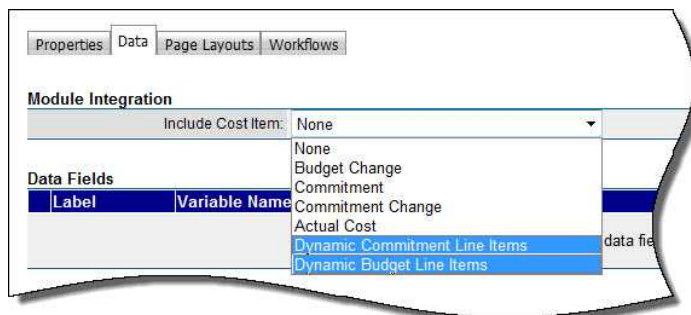
#### 1.8.11.2 About Dynamic Cost Processes

A dynamic cost process is an independent cost process that doesn't roll up into the built-in cost summary/cost sheet columns (budget, commitments, and actuals). These processes include a list of either budget or commitment line items and apply to the cost sheet in configured, additional columns that include the process – these columns are known as [dynamic cost columns](#).

These process types allow you to track and capture data outside of project-specific cost needs, such as tracking internal revenue, fees, or other expenses. Another reason for utilizing this feature might be to track and maintain multiple independent budgets, considering you are only allowed one budget per project in e-Builder. Additionally, if your capital program has an iterative budget approval process and you want to capture and track data through each phase of this progression – a dynamic budget process allows you to do so. Two dynamic



processes become available for configuration once this feature is enabled on the account: Dynamic Cost Commitment Line Items and Dynamic Cost Budget Line Items.



Related information is provided below:

- [Spawning Dynamic Cost Processes](#)
- [Dynamic Budget Line Item Processes](#)
- [Dynamic Commitment Line Item Processes](#)

## Spawning Dynamic Cost Processes

The capabilities of dynamic cost processes extend even further, as cost data carries over seamlessly when spawning between dynamic cost processes. This is an optional setting that must be configured on the Spawn Properties page. Considering this capability, you might choose to have an action in your dynamic process instance spawn another, related process. Using the iterative budget approval process example, a budget approval action in phase one of the budget approval process can spawn/start phase two of the process. The spawning feature is a great automation tool, but the added bonus when using with dynamic cost is that you do not have to manually pull in cost data if you don't choose to do so – it is all done for you. For more information on spawn processes, see [About Spawning Processes](#).

## Dynamic Budget Line Item Processes

Dynamic budget processes can be pulled into the formulas that create dynamic cost columns. Each feature has specialized use cases that may or may not be pertinent to your particular cost-related workflows.

Dynamic budget processes complement the dynamic cost column feature. A dynamic cost column is a custom cost column based on user-defined formulations of existing data, and dynamic budget processes can be used as a component in these equations; for detailed steps on this procedure, see [Add Dynamic Cost](#)

## [Columns.](#)

### Dynamic Commitment Line Item Processes

Specifically, the dynamic cost commitment process lends itself to common practices in horizontal construction where inspectors on the owner side perform daily or periodic inspections of contractor's work to compare against when it's time to provide monthly invoice amounts.

You can have a dynamic commitment item process set up to record periodic progress on the project. The daily report is typically used for unitized contracts where the inspector would indicate how many linear feet of roadway or curbs have been completed since the last report. By the end of the month there will be many of these progress reports. With a single click they can generate an invoice for all the work completed that is recorded in the daily reports since the previous invoice. The Daily Reports feature/tab becomes available on the commitment detail after this process is initiated.

#### Related Topics:

- [Configuring Dynamic Cost Processes](#)
- [Invoice Monthly Daily Reports](#)

#### 1.8.11.3 Add Dynamic Cost Columns

To add dynamic cost columns:

1. Go to the Cost Settings. For more information, see [Access Cost Settings](#).
  2. Expand **Cost Summary**, and then click **Dynamic Cost Columns**.
  3. Click **Add**. The Dynamic Cost Column Details page displays.
  4. In the **Name** field, enter a name for the dynamic cost column.
  5. Enter a description in the **Description** field.
  6. Click the **Process/Column** drop-down arrow and select an existing process/column.
  7. Choose an operation radio button.
  8. If necessary for your equation, enter a multiplier in the **Multiplier** field.
-

9. Click **Save**.

#### Related Topics:


- [Dynamic Cost Management](#)
- [Dynamic Cost Column Details Page Overview](#)

#### 1.8.11.4 Configuring Dynamic Cost Processes

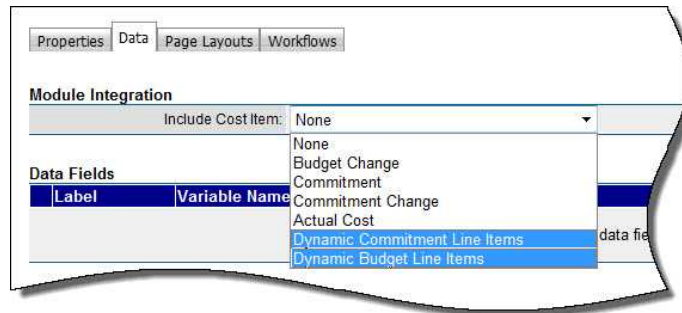
Setting up a dynamic cost process is much like configuring any cost process in e-Builder; the only difference is that from the **Module Integration** drop-down arrow, you will select one of the dynamic cost processes instead of a different cost entity. Detailed steps follow:

To set up a dynamic cost process:

1. Go to the process settings. For more information, see [Access Process Settings](#).
2. Click **Manage Processes**.
3. Click **Create New Process**. The Create New Process – Properties tab displays.
4. Enter all required fields.

 **Note:** See [Properties Tab Overview](#) for a detailed description of each field.

5. Click **Save**.
6. Click the **Data** tab.
7. Click **Edit**.
8. Click the **Include Cost Item** drop-down arrow to select one of the dynamic cost processes.



### 1.8.11.5 Dynamic Cost Column Details Page Overview

The Dynamic Cost Column Details page allows you to add new dynamic cost columns and view the details of existing dynamic cost columns. Below are detailed descriptions of the field and buttons located on this page. For more information on dynamic cost columns, see [Dynamic Cost Management](#).

Field	Description
<b>Properties</b>	
<b>Save</b>	Click this button to save your changes.
<b>Cancel</b>	Click this button to return to the Manage Dynamic Cost Columns page. All unsaved changes will be lost.
<b>Name</b>	Enter a name for the column in this field.
<b>Description</b>	Enter a description for the column in this field.
<b>Created By</b>	This field displays the name of the person that created the column.
<b>Created Date</b>	This field displays the date that the column was created.
<b>Last Modified By</b>	This field displays the name of the person who last made changes to the column.
<b>Last Modified</b>	This field displays the date that changes were last made.

<b>Date</b>	
<b>Formulas</b>	
<b>Process/Column</b>	Click this drop-down arrow to select a cost column to add to your dynamic cost column formula.
<b>Operation</b>	Choose an operation radio button that applies to the first part of your equation.
<b>Multiplier</b>	Optionally, you can enter a number to multiply the first field by.

Related Topics:

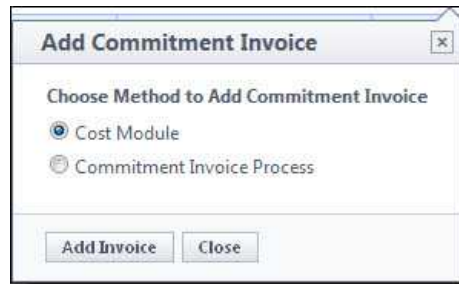
- [Add Dynamic Cost Columns](#)

#### 1.8.11.6 Invoice Monthly Daily Reports

The Daily Reports tab allows you to add an invoice for the monthly total of inspector daily reports. After the dynamic commitment process has been initiated, this tab appears on the Commitment Details page.

To invoice monthly daily reports:

1. Go to the Commitment Details page. For more information, see [Access the Commitment Details page](#).
2. Click the **Daily Reports** tab.
3. If necessary, filter for the appropriate daily report process.
4. Select the check box next to the processes you want to invoice against.
5. Click **Add Invoice**. The **Choose Method to Add Commitment Invoice** dialog box displays.



6. To add the invoice via the Cost module, select the **Cost Module** radio button, and then click **Add Invoice**. The Add Invoice page displays for you to submit the commitment invoice.

Or

To add the invoice via a process, select the **Commitment Invoice Process** radio button. The Select Process drop-down arrow displays. Select a process from the list, and then click **Add Invoice**. The process instance page displays for you to submit the commitment invoice.

### 1.8.12 Cost Mail Merge Templates

Mail merge templates provide the capability to extract cost data from e-Builder and plug them into a Microsoft Word® or Adobe PDF® document template. This eliminates the need to enter information into a Word document manually and reduces the margin for error. Having a system-generated document ensures the integrity of your data and it's a quick and easy way to consolidate information you've already entered once, in a ready-to-read format.

Mail merge templates can be updated with additional e-Builder field mappings to auto-populate cost data that may not be available on the default cost mail merge templates. For more information, see [Customize Template with Field Mappings](#).

Below is a list of procedures for managing mail merge templates:

- [Customize Template with Field Mappings](#)
- [Add/Edit Mail Merge Templates](#)
- [Add/Edit Mail Merge Template Page Overview](#)

#### 1.8.12.1 Customize Template with Field Mappings

e-Builder field mappings are available to help you quickly capture data that is stored in the system into your template. Information such as project name, project contact, custom fields, various company and information can all be automatically

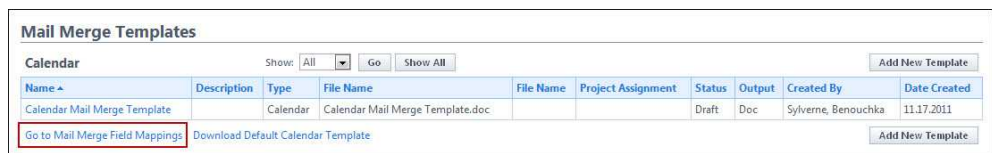
populated into your template. Using field mapping is easy and will help you save a lot of time when it is necessary to customize each calendar template according to project specifications.

To customize your template using field mappings:

- [Obtain Field Mappings](#)
- [Add Field Mappings to your Template](#)

### Obtain Field Mappings:

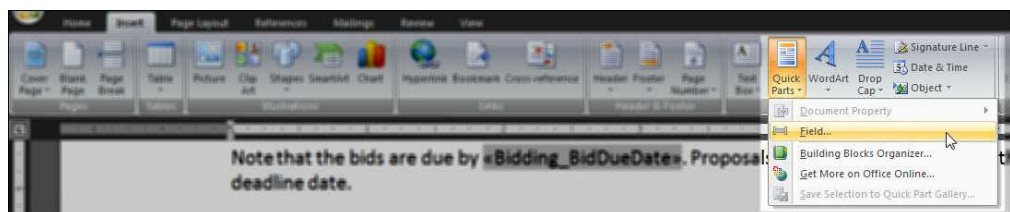
1. Click the Setup link.
2. In the Administration Tools section, click the module name you want to customize the template for.
3. Click **Mail Merge Templates** or **Fax Cover Sheet**. The Mail Merge Templates page displays.
4. Click the **Go to Mail Merge Field Mappings** link.



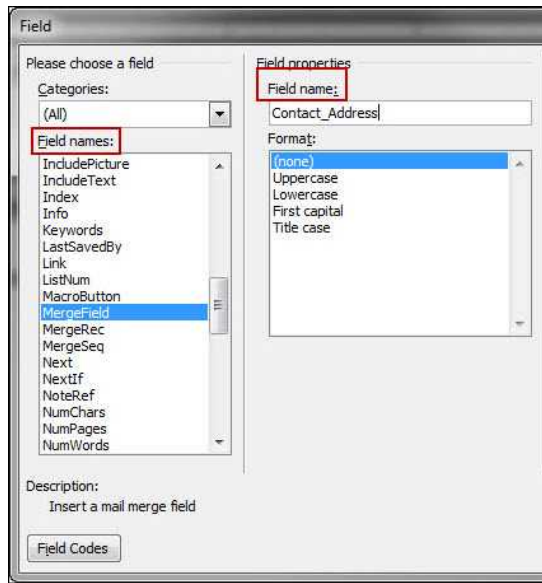
**Tip:** Keep this page open or print the merge codes for easy access when adding the field mappings to your template.

### Add Field Mappings to your Template (Using Microsoft Word 2007 ®):

1. Open the template you want to add field mappings to.
2. Place your cursor in the position you want to add the merge code.
3. Click the **Insert** ribbon.
4. Click the **Quick Parts** drop-down arrow, and then select **Field**.



- In the **Field names:** section, scroll down and select **MergeField**.



- Enter the e-Builder merge code in the **Field Name** field.
- Click **OK**. The merge code is added to the word document.
- Save the document to your local machine.
- To store this document as a template in e-Builder, see [Add/Edit Mail Merge Templates](#).

### 1.8.12.2 Add/Edit Mail Merge Templates

In working with mail merge templates, you are able to add templates to e-Builder and edit the template.

The following sections are included in this topic:

- [Add Mail Merge Templates](#)
- [Edit Mail Merge Templates](#)

### Add Mail Merge Templates

Having a template on file also gives you the ability to make necessary changes as they arise, without having to start over from scratch. If a custom mail merge template is not on file, users are able to use the default version.


**Tip:** It is recommended that you download the default Mail Merge Template to



start with and save it locally for upload in step 4 below. Although this template can be modified, the default is complete with all necessary field mappings. You can also customize the template field mappings to include specific data stored in e-Builder; for more information on how to customize the template, see [Customize Template with Field Mappings](#).

To add mail merge templates:

1. Go to Cost settings. For more information, see [Access Cost Settings](#).
2. Click **Mail Merge Templates**.
3. Click **Add New Template**. The [Add Mail Merge Template page](#) displays.
4. Complete all required fields:
5. Template Name
  - Make template Active (available for use) or Draft
  - Set output type (Word or PDF)
  - Click the **Type** drop-down arrow and select the type of Cost specific template you are creating
6. Click **Browse** to search for and upload the default or custom template. See the Tip above for more information.
7. In the **Project Assignments** section, select the project(s) that you'd like to assign the template to.
8. Click **Add**. The selected project(s) is added to the box on the right.

 **Note:** If you do not specify the project(s) that will use this template, the template will be available in all projects.

9. Click **Save**.

### Edit Mail Merge Templates

1. Go to Cost Settings. For more information, see [Access Cost Process Settings](#).
2. Click **Mail Merge Templates**.
3. Click the title of the template.
4. Click **Edit**. The Edit Mail Merge Template page displays.
5. Make any or all of the modifications listed below.
  - Change template name

- Add/Remove/Edit template description
- Change status - Make template Active (available for use) or Draft
- Change output type - Export documents to Word or PDF format
- Change template file - Upload a new mail merge template
- Assign template to projects

6. Click **Save**.


### 1.8.12.3 Add/Edit Mail Merge Template Page Overview

This page displays in the process of [adding or editing a cost mail merge template](#). Below is a detailed description of all the fields and buttons located on this page.

Field	Description
<b>Save</b>	Click this button to save changes.
<b>Cancel</b>	Click this button to return to the Mail Merge Templates page. All unsaved changes will be lost.
<b>Name</b>	Enter the name of the template in this field.
<b>Description</b>	Enter a description for the template in this field.
<b>Status</b>	Set the status of the template by selecting either the Active or Draft radio buttons. Active templates are automatically available for use and draft templates are not available in the user interface.
<b>Output</b>	Choose an output file type by selecting either the DOC or PDF radio buttons. This selection must match the file you will upload as the mail merge template.
<b>Type</b>	Click this drop-down arrow to select the type of cost entity this mail merge template will be for.
<b>File (*.doc)</b>	Click <b>Browse</b> to search for and upload the template file.

<b>Project Assignments</b>	Select the projects you want to make this template available for and the click <b>Add</b> to add selected projects in the adjacent 'Assigned to these Projects' box. If a project is not selected, the mail merge template will be available to all projects.
----------------------------	---

### 1.8.13 Forecasting

 **Note:** Forecasting is a feature that must be enabled by tech support in order to be utilized in the user interface; for assistance, please contact your e-Builder account manager.

Forecasting helps users plan for and anticipate possible conditions that may affect the project budget. Being able to plan for anticipated costs allows you to gage more accurate over/under budget projections for your projects. As time progresses on the project, you can use the forecast to take into consideration professional estimations by the project manager to reflect real life circumstances. The forecast can then be adjusted for each budget line item as appropriate, which will automatically affect the estimate at completion and forecasted over/under (variance) calculations.

#### Why Forecast?

Forecasting is really the core of any business plan because you must identify your destination before you can figure out the best path. A forecast is not 100% accurate, but accurate enough to identify possible risks. The earlier you know about a possible risk the better off you are in eliminating it.

In the world of construction, forecasting is a key ingredient to meeting or beating your budgets. By instituting a disciplined forecasting process you can communicate the anticipated cost of the project (and program) with much greater certainty. That process involves putting together carefully reasoned assumptions based on professional estimates, logs (like potential change order log, RFI log, issue log, etc.) and IT, furniture and equipment lists (to name a few) quantified in a systematic way to make your projections as accurate as humanly possible. Some of this information will be contained in various logs in your e-Builder reports, forms and documents.

Often people refer to forecasting as a mysterious process, as no one can predict the future. However, it is possible to make reasonable predictions or assumptions on how events will turn out based on the logical assessment of the facts presented to you and the e-Builder Forecast toolset allows you to do this. The more practice

and experience gained from forecasts, the easier and more beneficial forecasting becomes.

More information about facilitating the forecasting process is available in the user assistance help guide; see Forecasting for more information.

The following topics are included in this section:

- [Forecasting Settings Page Overview](#)

### 1.8.13.1 Forecasting Settings Page Overview

The Forecasting Settings page displays after Forecasting has been enabled on the account by an e-Builder Support staff member. To request access to this feature, please contact e-Builder Support at [support@e-builder.net](mailto:support@e-builder.net) or 1-888-288-5717.

Below is a detailed description of the fields and buttons located on this page.

Refer to Forecasting in cost to learn how to facilitate the forecasting process in e-Builder once it is enabled.

Field	Description
<b>Disable</b>	Click this button to disable the Forecasting toolset. Once forecasting data has been entered into the system, Forecasting cannot be disabled.
<b>Save</b>	Click this button to save changes.
<b>Forecasting</b>	This field displays the status of the forecasting feature, either enabled or disabled.
<b>Calculate Forecasted Over/(Under) Using</b>	<p>Click this drop-down arrow to make a choice on what the forecasted budget should be based on, either the current budget or projected budget. A description of each is provided below:</p> <p><b>Current Budget:</b> This is the approved original budget and all approved budget changes.</p> <p><b>Projected Budget:</b></p>

	This total includes the original budget amount plus all pending, projected, and approved budget changes.
<b>Forecasting Method</b>	<p>Click this drop-down arrow to make a choice on the method of forecasting. A description of each option is listed below:</p> <ul style="list-style-type: none"> <li>• <b>Detailed and Adjustments</b> – This is the default option. This method of forecasting allows users to switch back and forth between both modes while forecasting, giving users the option to view the forecast differently at any giving time.</li> <li>• <b>Detailed Only</b> – This option only allows users to work with forecasts in the detailed mode. For each budget line item, a list of forecasted commitments is recorded. Each item represents a future commitment that is not represented as a commitment or commitment change within the cost module. In addition to the description, assumption and forecast amounts there are check boxes for each forecast item that indicates whether or not the item is captured in the budget or in in commitments.</li> <li>• <b>Adjustment Only</b> – This option only allows users to work with forecasts in the adjustment mode. Each time the forecast is updated in adjustment mode, the cost manager is evaluating, on a budget line item basis, the unallocated against the amount of work left on the job and adjusting the reserve up or down as necessary.</li> </ul>
<b>Hide Current Commitments</b>	Select this check box to hide current commitments from the forecast. This feature allows you to customize the view and use of the forecast to better suit your needs.
<b>Hide Actuals Approved</b>	Select this check box to hide approved invoices from the forecast. This feature allows you to customize the view and use of the forecast to better suit your needs.
<b>Forecasting Instructions</b>	Enter instructional text for your users in this field. This is an opportunity to explain how to use forecasting. If this field is left blank it will not appear in the user interface.

Related Topics:

- [Forecasting](#)

### 1.8.14 Units of Measure

Commitments can be entered as lump sum quantities or as unit costs. In order to enter commitment items as unitized costs, the units of measure in the Cost module must first be defined.

These units of measure configurations affect the Planning module as well. When creating project scenarios, category assumptions can be entered using a number of metrics that include lump sum (LS), unitized cost (UC), square feet (SQ) and formula (F).

If these settings are not already defined, follow the steps below to define Cost Units of Measure.

1. Click **Setup**.
2. In the **Administration Tools** section, click **Cost**.
3. Click **Units of Measure**. If these settings are already defined, a list of available units of measure (UOM) displays. Otherwise, continue to step four to define the UOM.
4. Click **Use Defaults** to use a default list.

Or

Enter each individual UOM abbreviation and description per line.

5. Click **Save**.

## 1.9 Documents

### 1.9.1 Access Document Settings

To access Documents settings:

1. Click **Setup**. The e-Builder Setup page displays.
  2. In the **Administration Tools** section, click **Documents**. Links to various Documents settings display.
-

## 1.9.2 Manage Document Types

### 1.9.2.1 About Document Types

Having document types allow administrators to categorize the types of documents that are stored in the Documents module. This enhances document reporting and search capabilities. For each document type, you can set up one or more custom fields that can be used to capture additional information for each document type. This information can then be used in reports and in the [plan room](#).

Related Topics:

- [Add Document Types](#)
- [Enable Document Types](#)
- [About the Plan Room](#)

### 1.9.2.2 Add Document Types

To define document types:

1. Go to Documents Settings. For instructions, see [Access Documents Settings](#).
2. Click **Document Types**. The Document Types page displays.
3. To use default document types, click **Use Defaults**. The following defaults display:
  - As Built
  - Budget
  - Change Order
  - Contract
  - Correspondence

Or

To add your own document types, click **Add Document Type**. The Add Document Type page displays.

4. Enter the required fields.
5. Click **Save**.
6. If you are ready to make these document types available to users, click **Enable**.

Or

---

[Enable document types at another time.](#)

### 1.9.2.3 Enable/Disable Document Types

Document types can be enabled after they are added, or at a later time. Individual document types cannot be enabled at a time, but they must be enabled or disabled as a group.

To enable document types:

1. Go to Documents Settings. For instructions, see [Access Documents Settings](#).
2. Click **Document Types**. The Document Types page displays.
3. Click **Enable**.


To disable document types:

1. Go to Documents Settings. For more information, see [Access Documents Settings](#).
2. Click **Document Types**. The Document Types page displays.
3. Click **Disable**.

Related Topics:

- [Add Document Types](#)

### 1.9.2.4 Delete Document Types

 **Note:** You cannot delete document types that are already in use.

To delete document types:

1. Go to Documents Settings. For instructions, see [Access Documents Settings](#).
  2. Click **Document Types**. The Document Types page displays.
  3. Click the **Delete** link next to the document type. A confirmation dialog box displays.
  4. Click **Yes, delete the document type**.
-



## 1.9.3 Manage Document Custom Fields

### 1.9.3.1 About Document Custom Fields


Document custom fields are attributes of a document that help further describe it and its purpose. Examples of document custom fields might include *trade*, *language*, *PO Type* etc. With these values defined for each file, it broadens the scope by which users can report on, categorize, and search for the documents they need.

Related Topics:

- [Add Document Custom Fields](#)

### 1.9.3.2 Add Document Custom Fields

Custom fields allow you to gather additional information that may not be covered in the Documents module. This data is used for reporting purposes. Although you can add Document custom fields in Document Settings, it is recommended that custom fields are added through Global Custom Fields, which will allow you to add custom fields to any e-Builder module or object. For more information on custom fields, see [About Global Custom Fields](#).

 **Note:** In addition to having document custom fields available on the account, the 'Enable Document Control' setting must also be enabled at the project level to allow users to complete these custom fields. For instructions, see Enable Document Control.

To add document custom fields:

1. Go to Documents settings. For instructions, see [Access Documents Settings](#).
2. Click the **Custom Fields** link. The Document Custom Fields page displays.
3. Click **Add Field**. The Select Data Type page displays.
4. Select the type of field you want to create, and then click **Next**. The Custom Field Details page displays.
5. Enter the custom field name in the space next to **Field Label**.
6. Complete all necessary fields.
7. Click **Next**. The Field Summary page displays.
8. Review the custom field details. If changes are not required, click **Save**.

### 1.9.3.3 Associate Custom Fields with Document Types

Adding custom field options to document types creates file associations and gives users additional options by which to find the documents they're looking for during searches and reporting. For example, if one of your document types is Drawings, then you can add custom fields of Trade, Zone, and Floor to the Drawings document type. By setting it up this way, users will only see those custom fields specific to this document type (i.e. architectural drawings, drawings for zone A, 2nd floor drawings, etc.), when accessing files for reporting purposes or using the plan room.

Before you can associate custom fields to document types, please ensure that document types exist and are enabled for your project. For instructions on enabling and adding document types, see:


- [Add Document Types](#)
- [Enable/Disable Document Types](#)

To associate custom fields with document types:

1. Go to Documents Settings. For instructions, see [Access Documents Settings](#).
2. Click the **Document Types** link. The Document Types page displays.
3. Click the name of the document type you want to add custom fields to. A list of all document custom fields display in the box on the left.
4. Select the custom field(s) you want to add to the document type, and then click **Add**.
5. Use the controls on the right side of the page (**Top, Up, Down, and Bottom**) to order the items will appear.
6. Click **Save**.


## 1.9.4 Manage Custom Field Dependencies

### 1.9.4.1 About Custom Field Dependencies

 **Note:** Custom field dependencies can only be created with multi-pick lists and drop-down list custom fields because dependencies are created based on the values of these fields.

---

Custom field dependencies allow you to specify a controlling field, that when selected will display specific options for project participants to choose from. Narrowing down the options for users to choose from makes completing custom fields less daunting and more efficient. Making these associations further insures that proper data is being collected, which in turn strengthens report data. Field dependencies also speed up the manual effort required to complete custom fields as new projects are created.

 **For Example:**

If your organization builds for a Healthcare System with various hospital projects going on, you might have a custom field for Medical Center and another for On-Site Lab. Custom field dependencies would allow you to display only the labs which are appropriate for a specific medical center. The custom fields and values for each might be as follows:

Custom Fields (CF)	
	Medical Centers:
CF Values	Emergency Room
	Urgent Care
	Genetics
	Toxicology

	On-Site Labs:
	Radiology
	Blood Tests
	DNA

For an Emergency Room, it might make sense to have the Radiology and Blood Test labs available. However, for the Toxicology Center, the Blood Test lab might be the only one that applies. In addition to this, the Genetics Center might only need a DNA lab.

**Medical Center**

Emergency Room

**On-Site Lab**

Radiology ✓

Blood Tests ✓

DNA

**Medical Center**

Toxicology

**On-Site Lab**

Radiology

Blood Tests ✓

DNA

**Medical Center**  
Genetics

**On-Site Lab**  
Radiology  
Blood Tests  
DNA ✓

## Terminology

**Step 1:** Choosing the **Controlling** and **Dependent** Fields



**Add Custom Field Dependency**

**Select Fields**

\* Select a Controlling field: Medical Center ▼

\* Select a Dependent field: On-Site Labs ▼

When setting up field dependencies you will have to choose the controlling and a dependent field. The **controlling field** is the primary field of selection that will determine the available options of a subsequent field, which is referred to as the **dependent field**. From the examples above, the controlling field would be Medical Centers and On-Site Labs would be the **dependent field**.

## Assigning Field Dependencies

**Step 2:** Assigning field dependencies

When assigning dependencies, the values of the controlling and dependent fields display for you to make dependent field assignments. The diagram below is an overview of the sections on this page. For instructions, see [Add Field Dependencies](#).

Values of the Controlling  
Field, Medical Center

**Add Custom Field Dependency**

**Select Values**


Check/Uncheck All	Emergency Room	Urgent Care	Genetics	Toxicology
<input type="checkbox"/> Radiology	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Blood Tests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> DNA	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Values of the Dependent  
Field, On-Site Labs

#### 1.9.4.2 Add Document Custom Field Dependencies

To add custom field dependencies:

1. Go to Documents Settings. For instructions, see [Access Document Settings](#).
2. Click **Custom Fields**. The Document Custom Fields page displays.
3. Click **Field Dependencies**. The Document Custom Field Dependencies page displays.
4. Click **Add Dependency**. The Add Custom Field Dependency page displays.
5. Click the **Select a Controlling field** drop-down arrow to select the controlling field.
6. Click the **Select a Dependent field** drop-down arrow to select the dependent field.
7. Click **Next**. The Add Custom Field Dependency page displays.
8. Map the dependencies as appropriate to each controlling field. For a description of the fields and buttons located on this page, see [Add Custom Field Dependency Page Overview](#).
9. Click **Save** or **Save & Add** (if adding another field dependency) when you are complete with the assignments.

 **Note:** You do not have to select a dependency for each of the field values. For those that are left blank e-Builder will treat them as if there is no field dependency assigned and the user will have to select a value for each of the fields; hence, no link or dependency is in place.

Related Topics:

- [About Custom Field Dependencies](#)

- [Edit Custom Field Dependencies](#)

#### 1.9.4.3 Edit Custom Field Dependencies

To edit custom field dependencies:

1. Go to Documents Settings. For instructions, see [Access Document Settings](#).
2. Click **Custom Fields**. The Document Custom Fields page displays.
3. Click **Field Dependencies**. The Document Custom Field Dependencies page displays.
4. Click the edit link next to the field dependency you want to modify. The Edit Custom Field Dependency page displays.
5. Make the necessary changes. For a description of the fields and buttons located on this page, see [Edit Custom Field Dependency Page Overview](#).
6. Click **Save**.

Related Topics:

- [Add Document Custom Field Dependencies](#)
- [About Custom Field Dependencies](#)

#### 1.9.4.4 Delete Custom Field Dependencies

To delete custom field dependencies:

1. Go to Documents Settings. For instructions, see [Access Document Settings](#).
2. Click **Custom Fields**. The Document Custom Fields page displays.
3. Click **Field Dependencies**. The Document Custom Field Dependencies page displays.
4. Click the delete link next to the field dependency you want to remove. A confirmation page displays.
5. Click **Yes, Delete the Custom Field Dependency**.

Related Topics:

- [Add Document Custom Field Dependencies](#)
-

- [About Custom Field Dependencies](#)

## 1.9.5 Manage Document Stamps

### 1.9.5.1 About Document Stamps

Physically stamping documents can be time-consuming and costly, but necessary none-the-less. Document stamps are often needed to physically mark permits, drawings, submittals and payment applications. Without an electronic source to complete these tasks, these documents have to be printed, routed by mail or faxed and sent back to the sender. Account administrators are able to upload image files to be used as a stamp on any PDF document. After stamps are loaded, permissions can be set for each one. A list of pre-loaded stamps will appear when a document is opened and users will have the ability to drag and drop stamps onto their files.

The following topics will help you manage document stamps:

- [Upload Stamps](#)
- [Edit Stamps](#)
- [Delete Stamps](#)

### 1.9.5.2 Upload Document Stamps

The Document Stamps feature allows you to upload and then customize your own stamps into e-Builder for use on any document stored in the system, which includes files that are attached to all items in e-Builder.

To add document stamps:

1. Go to Document Settings. For instructions, see [Access Document Settings](#).
2. Click **Stamps**. The Manage Stamps page displays.
3. Click **Add Stamps**. The Add Stamp page displays.
4. In the **Stamp Details** section, complete all necessary fields. For a description of all the fields located on this page, see [Add/Edit Stamp Page Overview](#).
5. In the **Stamp Settings** section, complete all necessary fields.
6. In the **Permissions** section, complete all necessary fields.
7. Click **Save**.

Related Topics:

- [Edit Stamps](#)
- [Delete Stamps](#)

### 1.9.5.3 Edit Document Stamps

Document stamps can be modified by changing the stamp file itself or changing file name, size, transparency, name display, date display and level of access.

To edit stamps:

1. Go to Document Settings. For instructions, see [Access Document Settings](#).
2. Click **Stamps**. The Manage Stamps page displays.
3. Click the **Edit** link to the left of the image. The Edit Stamp page displays.
4. Make all necessary changes to the details of the stamp in the **Stamp Details** section. For a description of all the fields located on this page, see [Add/Edit Stamps Page Overview](#).
5. Make all necessary changes to the details of the stamp in the **Stamp Settings** section.
6. Make all necessary changes to the details of the stamp in the **Permissions** section.
7. Click **Save**.

Related Topics:

- [Upload Stamps](#)
- [Delete Stamps](#)

### 1.9.5.4 Delete Document Stamps

Stamps that have already been used will not be affected if the stamp is later deleted. Deleted stamps will no longer be available for use.

To delete stamps:

1. Go to Document Settings. For instructions, see [Access Document Settings](#).
  2. Click **Stamps**. The Manage Stamps page displays.
  3. Click the **Delete** link to the left of the image. The Delete Stamp confirmation page displays.
-



4. Click **Yes, Delete this Stamp**.

Related Topics:

- [Upload Stamps](#)
- [Edit Stamps](#)

## 1.9.6 Manage Spam Filter

### 1.9.6.1 About Spam Filter

The Spam Filter is used to detect spam that may have been emailed into document folders. Both e-Builder licensed and non-e-Builder users are able to email content into e-Builder Enterprise™ through the document library email-in capability, calendar responses, and via offline workflow. Especially in the context of emailing in to the document library, these document folders become vulnerable to spam. When the folder URLs are distributed to internal and external participants, these email addresses can find their way into the hands of spammers if, for example, a user adds the address to their outlook address book and their machine is compromised by malware that reads email addresses and sends to spam outlets. The result is that spam content is mailed into the e-Builder document folders.


The anti-spam filter analyzes inbound messages to determine whether or not they are spam. Non-spam is processed normally. Potential spam is quarantined. Account administrators can manage the spam quarantine by going to the [Quarantine](#) page. Items can be confirmed as spam and deleted or flagged as valid so that they're delivered normally.

Related Topics:

- [Enable/Disable Spam Filter](#)
- [Quarantine Page Overview](#)

### 1.9.6.2 Enable/Disable Spam Filter

The anti-spam filter is used to detect spam that may have been emailed into document folders.

 **Note:** This feature is enabled by default.

To enable or disable the anti-spam filter:

1. Go to Document settings. For instructions, see [Access Document Settings](#).
2. Click **Spam Filter**. The Spam Filter page displays.

3. To enable this feature, select the **Enable Spam Filter** check box.

Or

To disable this feature, clear the **Enable Spam Filter** check box.

Related Topics:

- [About Spam Filter](#)
- [Quarantine Page Overview](#)

## 1.9.7 Document Settings Page Overviews

### 1.9.7.1 Document Types Page Overview

This page allows you to add new document types and modify existing ones. For more information, see [About Document Types](#).

You can take the following actions on this page:

- [Add Document Types](#)
- [Enable/Disable Document Types](#)
- [Delete Document Types](#)

A description of the fields and buttons located on this page are provided in the table below:

Field	Description
<b>Enable</b>	Displays when document types are disabled. Click to enable all document types. Individual document types cannot be enabled at a time, they must all be enabled at the same time.
<b>Disable</b>	Displays when document types are enabled. Click to disable all document types. Document types cannot be disabled individually; you can only disable all at the same time.
<b>Document Control</b>	Displays whether or not document types are enabled or disabled.
<b>Use Defaults</b>	Click to add default document types to the list of account document types. Default options are as follows: <ul style="list-style-type: none"> <li>• As Built</li> <li>• Budget</li> </ul>

	<ul style="list-style-type: none"> <li>• Change Order</li> <li>• Contract</li> <li>• Correspondence</li> <li>• Drawing</li> <li>• Invoice</li> <li>• Meeting Minute</li> <li>• Permit</li> <li>• Reports</li> <li>• RFI</li> <li>• Schedule</li> <li>• Submittal</li> <li>• Transmittal</li> </ul>
<b>Add Document Type</b>	Click to add a new document type. The <a href="#">Add Document Type page</a> displays.
<b>Edit</b>	Click to make changes to document type details. The <a href="#">Edit Document Type page</a> displays.
<b>Delete</b>	Click to delete the document type. If the document type is currently in use, you will not be able to delete it.
<b>Name</b>	Displays the document type name.
<b>Description</b>	Displays the description of the document type.
<b>Created By</b>	Displays the name of the person who created the document type.
<b>Date Created</b>	Displays the date that the document type was created.

### 1.9.7.2 Add/Edit Document Type Page Overview

This page allows you to add and modify existing document types. A description of the fields and buttons located on this page are provided in the table below:

Field	Description
<b>Save</b>	Click to save changes

<b>Cancel</b>	Click to discard changes and return to the <a href="#">Document Types page</a> . All unsaved changes will be lost.
<b>Name</b>	Enter the name of the document type.
<b>Description</b>	Enter a description of the document type.
<b>Custom Fields</b>	
Use this section to associate custom fields to the document type. Document custom fields are attributes of a document that help further describe it and its purpose. Examples of document custom fields might include <i>trade, language, PO Type</i> etc. With these values defined for each file, it broadens the scope by which users can report on, categorize, and search for the documents they need.	
<b>All Custom Fields</b>	Select the custom fields you want to associate to the document type, and then click the right directional arrow to add them to the adjacent 'Selected Custom Fields' box.
<b>Selected Custom Fields</b>	Custom fields in this box are those associated with the document type. Use the up and down directional arrows to change the order in which these fields will display to end users.

### 1.9.7.3 Document Custom Fields Page Overview

The Custom Fields page allows you to view all available custom fields. The following tasks can be taken from this page:

- [Add Document Custom Fields](#)
- [Add Custom Field Dependencies](#)

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Reorder</b>	Click to change the order that the custom fields display. The <a href="#">Reorder Custom Fields page</a> displays.
<b>Add Field</b>	Click to add new custom fields. The <a href="#">Add/Edit Custom Field page</a> displays.

<b>Field Dependencies</b>	Click to add field dependencies. The <a href="#">Custom Field Dependencies</a> page displays.
<b>Edit</b>	Click to make changes to custom field details. The <a href="#">Add/Edit Custom Fields page</a> displays.
<b>Delete</b>	Click to delete the custom field. You are prompted for confirmation.
<b>Replace</b>	For drop-down and multiple pick fields only, click to replace an old value with the new value.
<b>Label</b>	Displays the custom field name.
<b>Data Type</b>	Displays the custom field data element.
<b>Permission</b>	Displays the custom field permission settings.
<b>Unique</b>	Displays whether or not the custom field is a unique. Unique custom fields are those that cannot be duplicated in other projects.
<b>Last Modified By</b>	Displays the name of the user that last modified the custom field record.

#### 1.9.7.4 Reorder Custom Fields Page Overview

Custom fields display in the order they appear here. Use this page to reorder custom fields. Select a field, and then use the directional arrows to change the position of select fields.

<b>Field</b>	<b>Description</b>
<b>Save</b>	Click to save changes
<b>Cancel</b>	Click to discard changes. All unsaved changes will be lost.

### 1.9.7.5 Document Custom Field Dependencies Page Overview

This page allows you to manage field dependencies. Custom field dependencies help you establish a relationship between related custom fields so that when a controlling field is selected or completed, the dependent fields will be restricted to the values available; dependent fields are not auto populated. Using this feature ensures that all custom fields that are related are filled out completely. To learn more, see [About Document Custom Field Dependencies](#).

The following actions can be taken from this page:

- [Add Document Custom Field Dependencies](#)
- [Edit Document Custom Field Dependencies](#)
- [Delete Custom Field Dependencies](#)

Below are descriptions of the fields and buttons located on this page:

Field	Description
<b>Add Dependency</b>	Click to add document custom field dependencies.
<b>Cancel</b>	Click to discard changes and return to the <a href="#">Document Custom Fields page</a> .
<b>Edit</b>	Click to make changes to the field dependency. The <a href="#">Edit Custom Field Dependency</a> page displays.
<b>Delete</b>	Click to delete the document custom field dependency. You are prompted for confirmation.
<b>Controlling Field</b>	Displays the controlling field. For more information, see <a href="#">About Custom Field Dependencies</a> .
<b>Dependent Field</b>	Displays the dependent field. For more information, see <a href="#">About Custom Field Dependencies</a> .

### 1.9.7.6 Edit Custom Field Dependency Page Overview

This page allows you to map the values of the controlling field to the values of the dependent field. Controlling field values display in the table header. Dependent fields are listed on the left side of the table. For more information on custom field dependencies, see [About Custom Field Dependencies](#).

For instructions, see [Add Document Custom Field Dependencies](#).

Below are descriptions of the fields and buttons located on this page:

Field	Description
<b>Save</b>	Click to save changes.
<b>Cancel</b>	Click to discard changes and return to the <a href="#">Document Custom Field Dependencies page</a> .
<b>Edit</b>	Click to edit the field dependency
<b>Delete</b>	Click to delete the field dependency
<b>Controlling Field</b>	This column lists the controlling fields, which is the field that will control the appearance of the dependency field when it is selected or completed.
<b>Dependent Field</b>	This column lists the dependent fields, which is the field that will appear when the controlling field is selected.

#### 1.9.7.7 Manage Stamps Page Overview

The Manage Stamps page allows you search for, view, edit and add new document stamps. From this page you can take any of the following actions:

- [Upload Stamps](#)
- [Edit Stamps](#)
- [Delete Stamps](#)

A description of the fields and buttons located on this page are provided in the table below:

Field	Description
<b>Filter Stamps</b>	
<b>Name Contains Text</b>	Enter some or all of the text included in the name of the stamp you want to filter for.
<b>Description</b>	Enter some or all of the text included in the description of the

<b>Contains Text</b>	stamp you want to filter for.
<b>Assigned to Role</b>	Click the drop-down arrow to make a selection and filter for stamps assigned to a specific role.
<b>Assign to User</b>	Enter a user's name to filter for stamps assigned to a specific user.
<b>Show All</b>	Click to show all stamps.
<b>Filter</b>	Click to filter for stamps based on filter criteria.
<b>Stamps</b>	
<b>Add New Stamp</b>	Click to add a new stamp.
<b>Edit</b>	Click to edit the details of the stamp.
<b>Delete</b>	Click to delete the stamp.
<b>Name</b>	Displays the name of the stamp. Click to open the <a href="#">Edit Stamp page</a> and modify the stamp.
<b>Description</b>	Displays the description of the stamp.
<b>File Name</b>	Displays the name of the stamp file.
<b>Height</b>	Displays the height of the stamp in pixels.
<b>Width</b>	Displays the width of the stamp in pixels.
<b>Transparency</b>	Displays the transparency percentage of the stamp.
<b>Permission</b>	Displays the access permission of the stamp.
<b>Last Modified By</b>	Displays the date and name of the person that last modified the stamp.



### 1.9.7.8 Add/Edit Stamp Page Overview

The Add Stamp page allows you to upload stamps into e-Builder and also adjust stamp settings and access permissions. For step-by-step instructions, see [Upload Stamps](#).

Below are descriptions of the fields and buttons located on this page:

Field	Description
<b>Save</b>	Click to save changes.
<b>Cancel</b>	Click to discard changes.
<b>Stamp Details</b>	
<b>Name</b>	Enter a name for the stamp.
<b>Description</b>	Enter a description of the stamp.
<b>Source File</b>	Click <b>Browse</b> to search for and upload a stamp. Only .jpg and .png file types are accepted.
<b>Preview</b>	
After an image as has been uploaded, it appears in this section and updates dynamically, based on the settings you apply to it. The background text gives you a preview of how the stamp will look layered on top of written content.	
<b>Stamp Settings</b>	
<b>Height</b>	After a file has been uploaded, this field automatically populates with the height of the picture in pixels. Enter a preferred height to make changes. Click away from this field to see the selected height in the Preview section.
<b>Width</b>	After a file has been uploaded, this field automatically populates with the width of the picture in pixels. Enter a preferred height to make changes. Click away from this field to see the selected width in the Preview section.
<b>Maintain Aspect Ratio</b>	This check box is selected by default. Select to keep the aspect ratio of the image as you make changes to the width and height.

<b>Transparenc y</b>	Modify the transparency of the image by sliding the node across the transparency bar. You can also use the up and down arrows in the percentage field. You are able to view the transparency setting in the preview section.
<b>Name Display</b>	<p><b>None</b> - This is the default setting. Select if you do not want to include a your name as part of the stamp.</p> <p><b>First Name Last Name</b> - Select to display your first and last name as part of the stamp.</p> <p><b>User Name</b> - Select to display your username as part of the stamp.</p>
<b>Position</b>	This setting displays only if a display name setting is selected. Click the drop-down arrow to select a position for the display name. Take a look at the Preview section to see how the display name appears.
<b>Font</b>	This setting displays only if a display name setting is selected. Click the drop-down arrow to select a font for the display name. Take a look at the Preview section to see how the display name appears.
<b>Formatting</b>	This setting displays only if a display name setting is selected. Select the <b>Bold</b> or <b>Italic</b> check box to modify the font style of the display name. Take a look at the Preview section to see how the display name appears.
<b>Date Display</b>	<p><b>None</b> - This is the default setting. Select if you do not want to include a date as part of the stamp.</p> <p><b>Date</b> - Select to display the date as part of the stamp.</p> <p><b>Date and Time</b> - Select to display the date and time as part of the stamp.</p>
<b>Position</b>	This setting displays only if a date setting is selected. Click the drop-down arrow to select a position for the date. Take a look at the Preview section to see how the date appears.
<b>Font</b>	This setting displays only if a date setting is selected. Click the drop-down arrow to select a font for the date. Take a look at

	the Preview section to see how the date appears.
<b>Formatting</b>	This setting displays only if a date setting is selected. Select the <b>Bold</b> or <b>Italic</b> check box to modify the font style of the date. Take a look at the Preview section to see how the date appears.
<b>Permissions</b>	
<b>Access Permissions</b>	<p><b>All Users</b> - This is the default selection. Level this check box selected to grant all users access to this stamp.</p> <p><b>Selected Roles</b> - Select to choose the roles you want to give permission to access this stamp.</p> <p><b>Selected Users</b> - Select to choose the users you want to give permission to access this stamp.</p>

#### 1.9.7.9 Quarantine Page Overview

The Quarantine page allows you to manage items that have been detected as spam. From here you can delete items or validate non-spam email so they are no longer identified as such. A description of the fields and buttons located on this page are provided in table below.

Field	Description
<b>Filter</b>	
<b>Sent</b>	Enter the dates that the email was sent to filter by sent date.
<b>Subject</b>	Enter the subject of the email in this field to filter by subject.
<b>Email Address</b>	Enter the email address the message was sent from to filter by email address.
<b>Folder</b>	Enter the folder name that the item was sent to to filter by filter.
<b>Status</b>	Click the drop-down arrow to filter by read or unread email.
<b>Clear</b>	Click to clear filter results.

<b>Filter</b>	Click to filter by entered criteria.
<b>Results Table</b>	
<b>Mark as Read</b>	Click to mark selected items as read.
<b>Mark as Unread</b>	Click to mark selected items unread.
<b>Not Spam</b>	Click to remove selected items from the list of quarantine items.
<b>Delete</b>	Click to delete selected items.
<b>Sent</b>	Displays the date the item was emailed.
<b>Subject</b>	Displays the subject of the email.
<b>From</b>	Displays the name of the person the email was sent by.
<b>Email Address</b>	Displays the email address of the person the item was sent by.
<b>Folder</b>	Displays the name of the folder the email was sent to.
<b>Project</b>	Displays the name of the project associated with the email.

## 1.10 Electronic Signatures

### 1.10.1 About Electronic Signatures

Electronic Signatures allow users to integrate a DocuSign account with their e-Builder account in order to electronically sign PDF files within e-Builder Enterprise™. This feature is supported through the Processes module. Account administrators are able to include signing actions on e-Builder process steps, which can be added to new and existing process steps. A DocuSign license is required in order to use this feature.

The most common use case for eSignatures is in contract approval processes and the like. Any user that is an actor on the signing step can be a signatory. In most cases, these actors are project managers, account executives, and directors. Signed

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documents are saved in the Documents module as soon as the signing action is taken for quick and convenient retrieval. Each signed document is added to what is referred to as an electronic envelope at the end of the process. This envelope becomes encrypted with an envelope ID, which certifies it as a unique, electronically signed file.

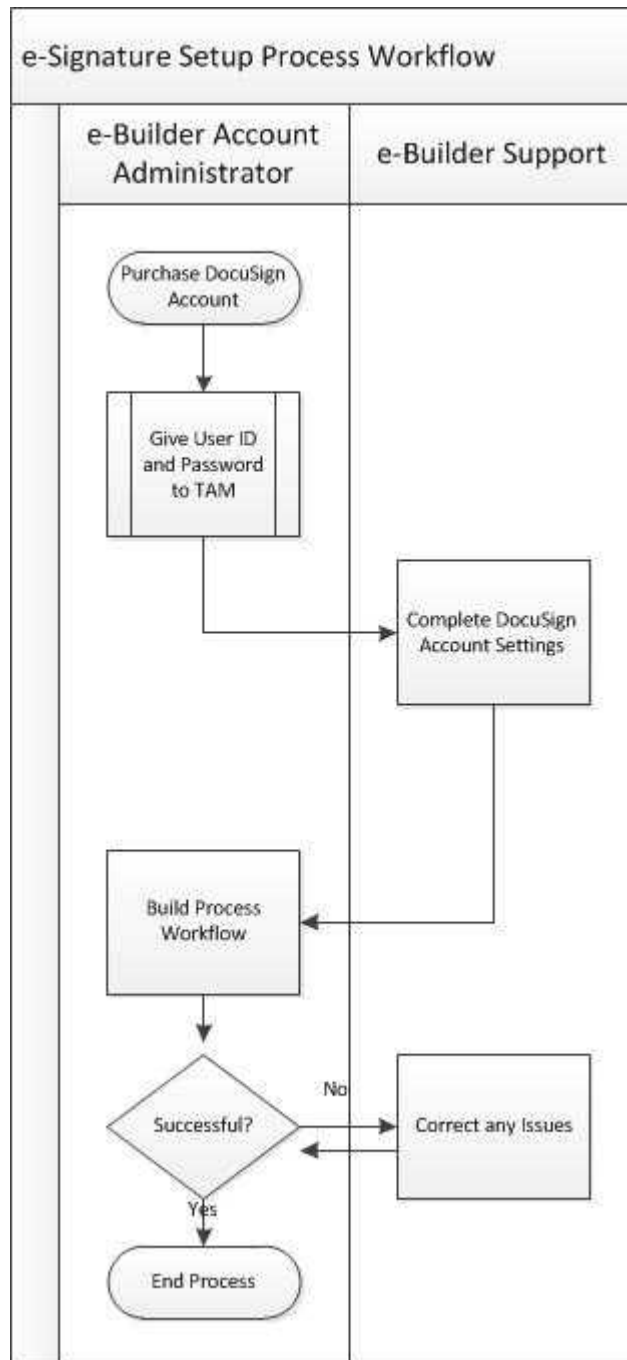
The ability to sign files electronically will reduce the time and cost associated with routing hard copy documents for wet signatures. This will also give project participants visibility of process status and instant access to signed documents.

The following topics will help you get started with eSignatures:

- [Setup Process Overview](#)
  - [Purchase DocuSign Account](#)
  - [eSignature Workflow Configuration Process Overview](#)
-

## 1.10.2 eSignature Setup Process Overview

Below is an outline of the overall process for setting up Electronic Signatures.



### 1.10.3 Purchase DocuSign Account

If you do not already have a DocuSign account, please contact your e-Builder account manager so they can help you with purchasing a license for your organization. If you do not have the contact information for your account manager, please contact e-Builder Support at 888-288-5717 (U.S.) or +1 954-556-6701 Option 7.

*\*This is step 1 of 3 in the overall process of implementing Electronic Signatures. For more information on this process, see [eSignature Setup Process Overview](#).*

### 1.10.4 Contact e-Builder Support with DocuSign Credentials

After purchasing the DocuSign license, please contact e-Builder Support at 888-288-5717 so they can configure your DocuSign account settings to work with the e-Builder Interface. Supply the Support team member with your DocuSign username and password.

*\*This is step 2 of 3 in the overall process of implementing Electronic Signatures. For more information on this process, see [eSignature Setup Process Overview](#).*

### 1.10.5 eSignature Workflow Configuration Process Overview

Although creating an eSignature step is a matter of choosing this setting on the action of the step, there are additional process and system configurations – both required and optional – that should be in place to support this feature. The procedure below is a high-level view of the eSignature configuration process.


1. Create roles that will be permitted to electronically sign documents in your eSignature process.
  2. If not already available, create file data field(s) to receive signed document(s).
  3. Configure eSignature Data Field Settings.
  4. Optionally, create a read-only layout to prevent signers from modifying the documents that need signatures.
  5. Enable eSignature Step.
  6. Add an automation step to your eSignature process.
-

**Related Topics:**

- [Individual Configuration Procedures](#)

### 1.10.6 Individual Configuration Procedures

Instructions for each of the individual configuration procedures are provided below.

 **Note:** These procedures assume that you are working with an existing process. For instructions on creating an e-Builder process, see [Create New Processes](#) in the e-Builder Online Help.

- [Create Roles for Each Set of Signees](#)
- [Create File Data Fields for File Upload](#)
- [Configure Data Field eSignature Settings](#)
- [Optionally, Create Read-Only Layout for Read-Only Documents](#)
- [Enable Step for eSignatures](#)
- [Add Automation Step](#)

*\*This is step 3 of 3 in the overall process of implementing Electronic Signatures. For more information on this process, see [eSignature Setup Process Overview](#).*

#### 1.10.6.1 Create Roles for Each Set of Signees

Actions that can be taken on each step are role based. Therefore, a role must exist for the signee or potential signees of the eSignature step. This preliminary task is to ensure that as you select a role for the signing step, it includes only those persons that are allowed to sign the document. Otherwise, all actors in the selected role will have the ability to sign.

Creating a role with specific users is a two-step process. You must first create the role, and then add users to the role. Instructions are provided below:

To create a role for each signee or sets of signees:

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1. Click **Setup** to access Administration Tools.
2. Click **Users** and then **Manage Roles**. The Manage Roles page displays.
3. Click **Add Role**. The Add Role page displays.
4. Enter a name for this role in the Name field.

**Example:** An example naming convention might be <Process Name>, <Step Name>.


5. Optionally, you can also enter a description in the Description field.
6. Click **Save**. The Manage Roles page displays.

To add users to the role

1. Click the name of the account role. The View Role page displays.
2. Click **Add User To Role**. The Add User(s) to [Role Name] page displays.
3. Filter for users, and then select the check box next to the user's name.
4. Click **Add User**.


#### 1.10.6.2 Create File Data Fields for File Upload

File data fields make it possible for actors to upload documents. The same or different file data fields can be used to point to the destination folder of your choice. If you already have file data fields created that can be incorporated into your eSignature process, then this task is not required. Complete this task only if you do not already have the appropriate file data fields available.

 **Tip:** Create a file data field for the upload of the final document as well. This way, you can store the final signed document in the appropriate location, perhaps in a limited-access folder.

To create a file data field:

1. Go to the process' Data Tab. For instructions, see [Access Data Tab](#) in the Builder Online Help.
2. Click **Add Field**. The Add Data Field page displays.
3. Select the **File** radio button, and then click **Next**.
4. Complete all necessary fields.

 **Note:** Select the destination folder of the file in the Destination Folder Path field. If you do not choose a folder, users will have to choose one at the time of upload.

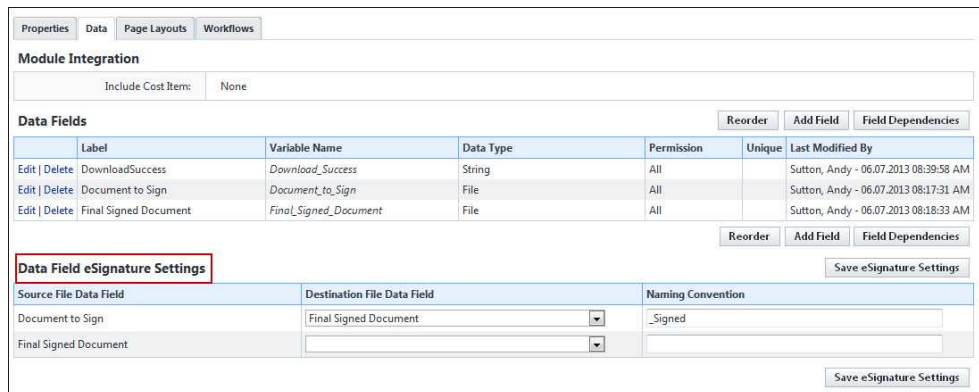
5. Click **Next**. The field summary page displays a preview of the field just created.
6. Click **Save** or **Save & Add** to create another data field.

### 1.10.6.3 Configure eSignature Data Field Settings

eSignature data field settings allow administrators to specify the destination file data field, and a naming convention for the final version of the signed document.

To configure eSignature data field settings:

1. Go to the process' Data Tab. For instructions, see [Access Data Tab](#) in the e-Builder Online Help. All existing file data fields display in the Data Field eSignature Mappings section.




Label	Variable Name	Data Type	Permission	Unique	Last Modified By
DownloadSuccess	Download_Success	String	All		Sutton, Andy - 06.07.2013 08:39:58 AM
Document to Sign	Document_to_Sign	File	All		Sutton, Andy - 06.07.2013 08:17:31 AM
Final Signed Document	Final_Signed_Document	File	All		Sutton, Andy - 06.07.2013 08:18:33 AM

Source File Data Field	Destination File Data Field	Naming Convention
Document to Sign	Final Signed Document	_Signed
Final Signed Document		

2. For each file data field that will contain a document to be signed, click the adjacent **Destination File Data Field** drop-down menu to select the file data field that will be used as the destination folder for the signed document.

 **Note:** This drop-down menu includes all existing file data fields. Files will go to the destination folder associated with the selected data field; to add or change the destination folder, edit the data field. If a folder is not specified, the user will be asked to make a selection when the file is uploaded.

3. In the **Naming Convention** field, enter a name to be appended to the end of the final document after all documents in the document set have been signed.

**Example:** If you use the suffix “\_signed” and the name of the document is e-Builder User Guide, the final version that includes all signatures will be called, e-Builder User Guide\_signed.

4. Click **Save eSignature Settings**.

#### 1.10.6.4 Optionally, Create Read-Only Layout for Read-Only Documents

The read-only layout is necessary to keep a file from being edited. As a business rule, you may not want to give signatories the ability to modify the files they need to sign; however, in a revision step, you might. Create the read-only layout based on the business rules that govern the process.

To create a read-only layout:

1. Go to the Page Layouts tab. For instructions, see [Access Page Layouts Tab](#) in the Online Help.
2. Click **Add Layout**. The Layout Properties page displays.
3. Enter the name of the layout in the **Layout Name** field.
4. Click **Save**. The Edit Layout page displays.
5. Select the data field on the right side of the page and drag into the Data section.
6. Select the field so that it is highlighted.
7. Right-click the highlighted field and select **Edit Field Properties**. The Section Field Properties dialog box displays.
8. Select the Read-Only check box, and then click **Save**. The dialog box closes and you are now on the Layout Properties page.
9. Click **Save**.

#### 1.10.6.5 Enable eSignature Step

The eSignature feature is enabled on the action of a process step. There are two parts to this particular step of the configuration. You must create a signing action and a non-signing action in order to give the signee an alternate action in case they choose not to sign the document during a particular process instance.

The following instructions are below:

- [Add a Signing Action](#)
- [Add an Alternate, Non-Signing Action](#)


## Add a Signing Action

To add a signing action:

1. Go to the Workflow Designer. For instructions, see [Workflow Designer](#) in the e-Builder Online Help.
2. To create a new step, drag and drop the Data Entry step to the Workflow Designer. The Edit Step page displays.

Or


3. To modify an existing step, right-click the step, and then click **Properties**. The Edit Step page displays.
4. Complete all necessary fields.
5. To make the file read-only, select a read-only layout from the **Actor Layout** drop-down menu.
6. Click **Add Action**. The Add Action page displays.
7. Complete all necessary fields, and in particular:
8. Select the **Require Signature(s)?** check box.
9. Select the signee's use role(s).

 **Note:** Please be aware that all users within the selected role will have the ability to sign the document. To limit these users to the required signatories only, create a user role that includes only the qualified signees.

10. Click **Save**.

## Add an Alternate, Non-Signing Action


A non-signing action is required in order to give the actor an alternate action. A probable secondary action might be 'Decline' or 'Revise and Resubmit', which could potentially kick start the process all over again.

 **Warning:** If the same file or a new file is uploaded, the current envelope ID becomes void and a new envelope will have to be created. In this case, all previous signees will have to sign each file again. A single envelope can contain a number of documents.

To add a non-signing action:

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1. Go to the Workflow Designer. For instructions, see [Access Workflow Designer](#) in the e-Builder Online Help.
2. To create a new step, drag and drop the Data Entry step to the Workflow Designer. The Edit Step page displays.  
Or
3. To modify an existing step right-click the step, and then click **Properties**. The Edit Step page displays.
4. Complete all necessary fields.
5. To make the file read-only, select a read-only layout from the Actor Layout drop-down menu.
6. Click **Add Action**. The Add Action page displays.
7. Complete all necessary fields, EXCEPT the Require Signature(s)? check box. Leave this check box clear.
8. Select the signee's use role(s).

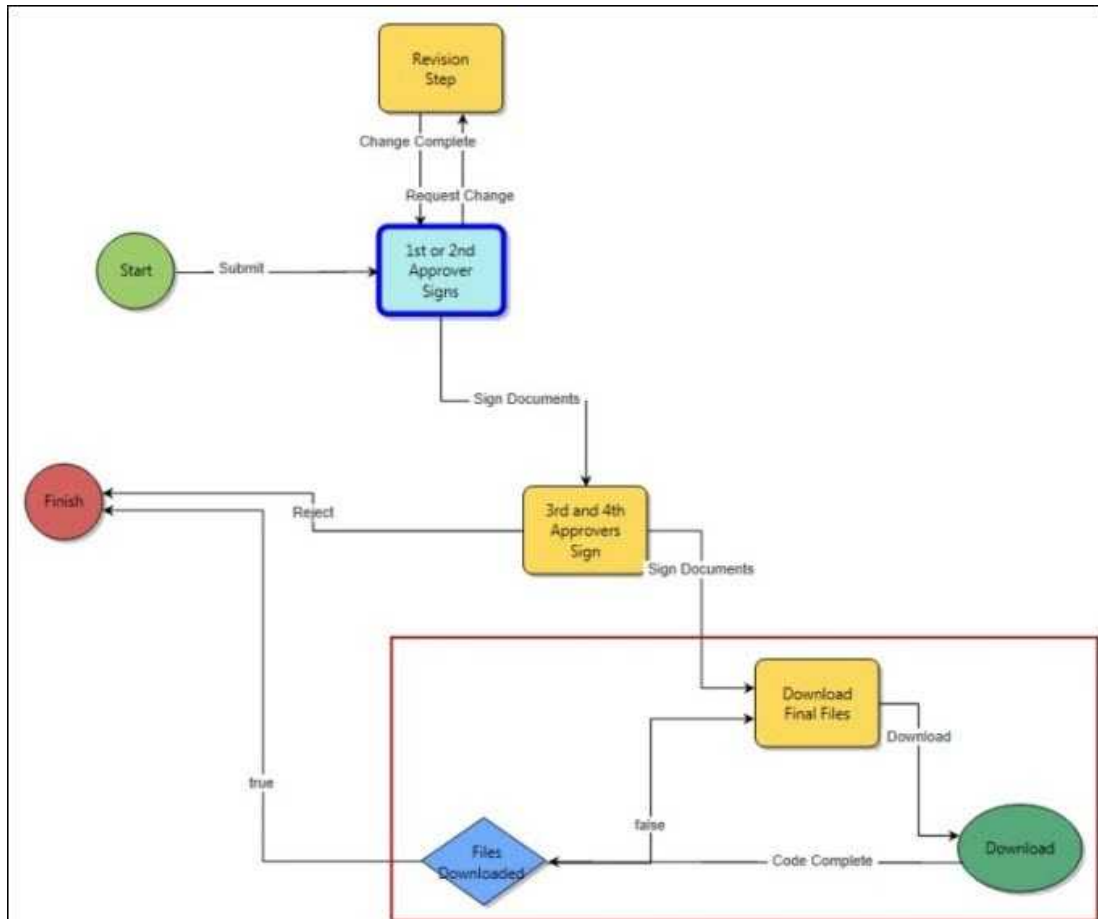
 **Note:** Please be aware that all users within the selected role will have the ability to sign the document. To limit these users to the required signatories only, create a user role that includes qualified signees only.

9. Click **Save**.

#### 1.10.6.6 Add Automation Step

An automation step must be placed at a point in the process after all documents have been signed. This step compiles the final document which includes all eSignatures and an encrypted certificate that solidifies it as a unique and final version of the document.

The end of your eSignature process should look similar to the highlighted portion of the diagram below:





To add an automation step to an eSignature process:


1. Go to the [Workflow Designer](#). For instructions, see [Access Workflow Designer](#) in the Online Help.
2. Drag and drop the automation step to the Workflow Designer. The Edit Automation Step page displays.
3. Complete all necessary fields and specifically:
  - Click the **e-Signature File Download** radio button.
4. Click **Save**.

### 1.10.7 eSign Documents

Once a process step is configured with a signing action, this action will be listed in the Action drop-down menu for you to select.


 **Note:** Only PDF files can be electronically signed.

 **Tip:** [Watch this video tutorial](#) on electronically signing documents.


 **Warning:** If you changed your first or last name in your e-Builder profile while a signature-requiring step was in your court or a process that requires your signature was already initiated, you will not be able to sign the document. Therefore, it is advised that before changing your first or last name, to please verify that there aren't any processes in progress that require your signature. If your name is changed outside of these boundaries, you will be prompted to create a new signature upon signing; at which point, you can also enter a new name (that does not have to match your e-Builder profile name).

To electronically sign a document:



1. Open the process that contains the file you want to sign. Go to the Process Details page. For instructions, see Access Process Details Page in the Online Help.
2. Complete all necessary fields.
3. Click the **Action** drop-down arrow and select the signing action.

 **Note:** Step names are configurable; therefore, the name of this step will be different for every user.

4. Click **Take Action**. A message displays prompting you for an electronic signature.

 **Note:** You are not required to click the Take Action button if the process has been configured to allow the action to take place by simply making a selection from this drop-down menu. For more information on this setting, see [Workflow Properties Page Overview](#) in the Online Help.

5. Click the link, **Click here to review and sign your document(s)**.
6. Click **Review Document**. The file opens in DocuSign.
7. Review and locate where your signature is necessary.
8. Drag and drop your signature from the **Signature Context** menu.


 **Note:** This context menu displays by default, but should you need to reopen it, click the pencil icon .

9. Click **Finish**. You are prompted for confirmation.
10. Click **Yes**. A success message displays on the e-Builder Process Instance page.

11. Click **Continue** to complete this step.

## 1.11 Equipment Management

### 1.11.1 About Equipment Management

 **Note:** Equipment Manager is an account attribute that must be enabled by e-Builder Technical Support. To request access, please contact e-Builder Support.

With a large percentage of project costs allocated to furnishings and equipment - for example up to 40% in medical facilities - it is important to be able to manage these expenses in detail. Equipment Manager allows owners to keep track of the costs associated with items that have been purchased by the owner and installed by either the owner or a contracting company. In this way, owners are aware of exactly what has been purchased, installed and which items are still in inventory, so you know exactly how much money has actually been spent on the project.

Optionally, you can incorporate equipment costs into the overall budget and expense process by tying equipment purchases to your commitments. This will give you an accurate representation of project costs and make the purchasing process more cohesive and better organized. Equipment Manager works perfectly as a stand-alone tool, but also integrates seamlessly with Attainia, a well-known equipment management system used by many healthcare facilities. So if you utilize Attainia for equipment planning, your equipment list can be automatically populated in e-Builder with no duplication of effort or data entry errors.

The following task will assist you when managing the equipment management feature:

- [Configure Project for External Equipment Management](#)
- [About Equipment and Cost Integration Settings](#)
- [Define Role-Based Permissions](#)

### 1.11.2 Access Equipment Management Settings

To access Equipment Management settings:

1. Click **Setup**. The e-Builder Setup page displays.
  2. In the **Administration Tools** section, click **Equipment Management**. Links to various Equipment Management settings display.
-



### 1.11.3 Configure Project for External Equipment Management

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Update Project Details' Permission*

A project can be configured to use Equipment Manager strictly for budgeting and viewing the equipment list and the status of equipment items in e-Builder. When this setting is enabled, the equipment list cannot be compiled or managed in e-Builder, but items can still be tied to the budget. An account or project administrator is able to complete this task.

To configure a project for external equipment management:

1. Go to the Project Details page. For instructions, see [Access Project Details page](#).
2. Click **Edit**.
3. Scroll down and click the **Settings** tab.
4. In the **Equipment Management Tools Integration** field, click **Yes**.
5. Click **Save**.

### 1.11.4 About Equipment and Cost Integration Settings

In order to integrate the Equipment Management feature with the Cost module, three configuration settings need to be completed.

1. [Create Budget Line Item Custom Fields](#)
2. [Create Equipment Item Custom Fields](#)
3. [Establish Equipment and Budget Item Association](#)

Budget line item and equipment item custom fields are necessary if you plan to associate equipment items to your budget. Doing so allows you to incorporate equipment purchases into the overall project budget. Only a single budget line item custom field is required to establish this relationship. The custom field can only be of type drop-down or multi-pick list.

The values of the equipment item custom field used to establish this relationship should be identical to the values created for the budget line item custom field. In practice, the corresponding values of the budget line item and equipment item custom fields will associate these entities to another.

**Example:** An example budget line item custom field might be called Equipment, so that it's easily identifiable in the user interface and the values would be a list of equipment items such as:

- X-Ray Film Processor
- X-Ray Film Viewer
- X-Ray Unit
- X-Ray Mobile
- Ultrasound

#### 1.11.4.1 Create Budget Line Item Custom Fields

This task can be completed by:

- *Account Administrators*

Budget line item and equipment item custom fields are necessary if you plan to associate equipment items to your budget. Doing so allows you to incorporate equipment purchases into the overall project budget. Only a single budget line item custom field is required to establish this relationship. The custom field can only be of type drop-down or multi-pick list. For more information, see [About Cost Integration Settings](#).

To create budget line item custom fields:

1. Go to the Setup.
  2. In the **Administration Tools** section, click **Cost**.
  3. Click **Custom Fields**, and then **Budget Line Items**.
  4. Click **Add Field**.
  5. Select the **Drop Down List** or **Multiple Pick List** radio button and click **Next**.
  6. Enter a name for this custom field in the **Field Label** field.
  7. Enter values for this custom field.
  8. Complete all other necessary fields.
  9. Click **Next** to preview the field.
  10. Click **Save**.
-

#### 1.11.4.2 Create Equipment Item Custom Fields for Cost Integration

This task can be completed by:

- *Account Administrators*

Equipment item custom fields allow you to capture additional information about equipment items, but at least one custom field of type drop-down or multi-pick list is required to establish the relationship between equipment and budget line items. For more information, see [About Cost Integration Settings](#).

To create equipment item custom fields:

1. Go to the **Setup**.
2. In the **Administration Tools** section, click **Equipment Management**.
3. Click **Custom Fields**. The Equipment Item Custom Fields page displays.
4. Click **Add Field**.
5. Click the **Drop Down List** or **Multiple Pick List** radio button and click **Next**.
6. Enter values for this drop-down list custom field in the **Drop Down List** field.
7. Complete all other necessary fields.
8. Click **Next** to preview the field.
9. Click **Save**.

#### 1.11.4.3 Establish Equipment and Budget Item Association

This task can be completed by:

- *Account Administrators*

To establish a relationship between equipment items and budget line items, you must select the appropriate equipment and budget custom fields; those created specifically for this association and have identical values. For more information, see [About Cost Integration Settings](#).

To establish the association between equipment and budget items:


1. Go to the Setup.
2. In the **Administration Tools** section, click **Equipment Management**, and then **Manage Mapping**.
3. Click the **Equipment Items** drop-down arrow to select an equipment item custom field to map to a budget line item custom field.
4. Click the **Budget Items** drop-down arrow to select a budget line item custom field.
5. Click **Save**.

### 1.11.5 Define Role-Based Permissions

This task can be completed by:

- *Account Administrators*

Setting role-based permissions for Equipment Management allows you to define the level of access that each role will have for working with the equipment list. You can define account level or project level access for viewing and editing equipment lists.

 **Note:** If you will be applying permissions on the project level for a particular role, you should not include users in that role on the account level, because the account role will take precedence over the project role. For more information, see [About Project Level Roles](#).

The procedures for defining role-based permissions assume that the account and project roles already exist. For instructions, see [Add New Account Roles](#) and [Add Users to Account Roles](#).

The following procedures will assist you with defining account and project-level permissions:

- [Manage Permissions](#)
  - [Add User to Project Level Role](#)
-

## 1.11.6 Add Equipment Item Custom Fields

This task can be completed by:

- *Account Administrators*

Equipment item custom fields allow you to capture additional information about equipment items, but at least one custom field of type drop-down or multi-pick list is required to establish the relationship between equipment and budget line items. For more information, see [About Equipment and Cost Integration Settings](#).

To add equipment item custom fields:

1. Go to Equipment Management settings. For instructions, see [Access Equipment Management Settings](#).
2. Click the **Custom Fields** link. The Equipment Management Custom Fields page displays.
3. Click **Add Field**. The Select Data Type page displays.
4. Select the type of field you want to create, and then click **Next**. The Custom Field Details page displays.
5. Enter the custom field name in the space next to **Field Label**.
6. Complete all necessary fields.
7. Click **Next**. The Field Summary page displays.
8. Review the custom field details. If changes are not required, click **Save**.

## 1.11.7 Equipment Management Page Overviews

### 1.11.7.1 Equipment Item Custom Fields Page Overview

Use this page to add new or make changes to existing custom fields. Equipment item custom fields allow you to capture additional information about equipment items, but at least one custom field of type drop-down or multi-pick list is required to establish the relationship between equipment and budget line items. For more information, see [About Cost Integration Settings](#). When adding custom fields, you are taken through a three step wizard . For instructions, see [Add Equipment Item Custom Fields](#). A description of the fields and buttons located on each page is

located in the table below:

<b>Step 1 of 3</b> <b>Select Data Type:</b>	
Select the type of data field you'd like to add. A description of each option is below.	
<b>String</b>	Allow users to enter a single line of text.
<b>Text Block</b>	Allow users to enter multiple lines of text.
<b>Integer</b>	Allow users to enter only a numeric value.
<b>Decimal</b>	Allow users to enter only decimal values.
<b>Drop Down List</b>	Allow users to select one value from a list of values
<b>Multiple Pick List</b>	Allow users to select any number of values from a list of values
<b>Date</b>	Allow users to enter a date manually, or select from the calendar icon.
<b>Account User</b>	Allow users to select a single user from a list of all users on the account.
<b>User In Role</b>	Allow users to select a single user from a list of users in the selected role.
<b>User In Role On Project</b>	Allow users to select a single user from a list of users in the selected role that are members of the current project.
<b>Step 2 of 3</b> <b>Add Custom Field</b>	
Use this page to enter custom field details.	
<b>Previous</b>	Click to return to the previous page.
<b>Next</b>	Click to go to the next step of the field creation process.
<b>Cancel</b>	Click to cancel and return to the Custom Fields page. All data will be lost.

<b>Field Label</b>	Enter a label for the custom field.
<b>Description</b>	Enter a description of the custom field.
<b>Required</b>	Select to make this a required field. Leave clear to make this an optional field.
<b>Default Value</b>	Enter a default value for the field.
<b>Permissions</b>	<p><b>Admin Edit Only</b> - Select to make this field editable to Account Administrators only.</p> <p><b>All Users</b> - Select to make this field editable for all users on the account.</p> <p><b>Role Name</b> - For each role, select the view or edit permission, which will allow the selected role to either have only view permission or grant them edit permissions.</p>
<b>Maximum Length</b>	Displays for String fields only. Enter the maximum number of character that users can enter in this field. If left blank, a negative value is automatically entered, which is equal to an infinite number of characters.
<b>Minimum Length</b>	Displays for String fields only. Enter a least amount of characters that users can enter in this field.
<b>Visible Rows</b>	Displays for Text Block and Multiple Pick List fields only. Enter the number of visible rows you want to display in the scrollable window. Team members will have to scroll to see the additional options.
<b>Length</b>	Displays for Text Block fields only. Enter the maximum number of character you'd like available for this field.
<b>Decimal Places</b>	Displays for Decimal fields only. Enter the amount of decimal places to set this field to, for example, two (0.12) or four (0.1234) decimal places.
<b>Drop Down List Options</b>	Displays for Drop-Down fields only. Enter the options that users should choose from. Enter one option per line.
<b>Sort Values</b>	Displays for Drop-Down and Multiple Pick List fields only. Click to sort values in alphabetical order.
<b>Multiple Pick List Options</b>	Displays for Multiple Pick List fields only. Enter the options that users will choose from. Enter one option per line.
<b>Roles</b>	Displays for 'User in Role' and 'User in Role on Projects' fields

	only. Select a role to narrow the list down by the users in the role selected.
--	--

### Step 3 of 3 (Field Summary and Preview)

This page displays the details of the custom field and allows you to see a preview of what the field will look like to end users.

#### 1.11.7.2 Equipment Item Mapping Page Overview

This page allows you to select the equipment item custom field and budget line item custom field that will be used to establish the association between the two. Completing this setting is essential for incorporating equipment items into the budget and cost process. For more information, see [About Equipment and Cost Integration Settings](#).

Field	Description
<b>Equipment Items</b>	Click the drop-down arrow to select the custom field configured for cost integrations. See <a href="#">Create Equipment Item Custom Fields</a> for more information.
<b>Budget Items</b>	Click the drop-down arrow to select the custom field configured for equipment item integration. See <a href="#">Create Budget Line Item Custom Fields</a> for more information.
<b>Save</b>	Click to save the changes.

## 1.12 Forms

The e-Builder Forms module helps you manage business processes by streamlining the circulation of documents, drawings, and other required communications. An electronic log is captured of all actions taken on a form, once it has been initiated. Logs are recorded throughout the life of the form, which aids auditing, reporting, and retrieval. Account administrators can create an endless number of forms to mimic processes traditionally routed around the office in paper format. All of the appropriate users are notified instantly via email when a new issue requires their attention or when an item has arrived in their court. With instant notifications, e-Builder reports, and increased visibility for the whole team, the entire process becomes more secure and efficient.



Forms are created according to your business processes, and can be manually routed to select users and copied to any of the roles on your projects. Such forms might include, RFI's, Accident Reports, and Project Issues. Unlike paper forms, e-Builder's electronic forms allow you to check on the status of a particular issue by simply logging into e-Builder and going to the Project Forms page. Forms provide a complete audit trail/history and can be customized based organizational need.

## Types of Forms

There are two form types available in e-Builder: Static and Workflow Forms.

**Static Forms (Non-Routable):** Static forms are one-way communications to team members, often communicating the procedural information status of specific items. Static forms are mainly for informational purposes. Team members can be notified of static postings using the copy (CC) functionality, but static postings are not routed.

Examples of static forms include:

- Daily Log Reports
- Accident Reports
- Fields Observations
- Warranty Trackers

**Workflow Forms (Routable):** Workflow forms are routed communications to team members, used when a specific response is necessary from the recipient(s). For example, Workflow forms are used to send someone an item that requires approval or a written answer to a question. Workflow forms use the "ball in court" analogy to indicate who is currently responsible for taking action on an item. When the form is "in your court," you can edit the data fields in the form and then send the form on to the next person in the route. The form will then "land" in the next person's "court." When a workflow is initiated, the recipient and all users cc'd receive e-mail notification of the posting and all subsequent activity on the workflow.

Examples of workflow forms include:

- Design Reviews
- Addenda
- Project Issues
- Requests For Information
- Change Orders
- Architectural Supplemental Instructions

- Punch Lists
- Daily Inspections
- Contract Approvals

## Managing Forms

Here are a few tasks that will help you get started managing forms:

- [Create New Form Types](#)
- [Manage Form Permissions](#)
- [Add Form Type Custom Fields](#)
- [Add Form Mail Merge Templates](#)

### 1.12.1 Manage Forms

#### 1.12.1.1 Access Forms Settings

To access Forms Settings:

1. Click the **Setup** link located on the e-Builder banner, nested under your username.
-



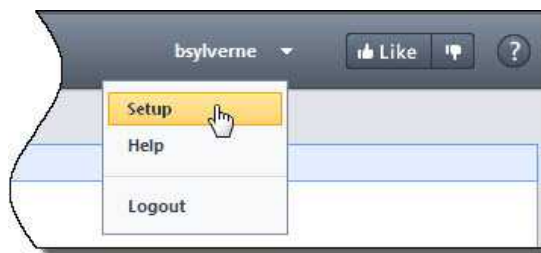
The Setup page displays

2. In the **Administration Tools** section, click **Forms**. All Forms configuration options display.

### 1.12.1.2 Access Manage Form Types Page

To access the Manage Form Types page:

1. Click the **Setup** link located on the e-Builder banner, nested under your username.



The Setup page displays

2. In the **Administration Tools** section, click **Forms**.
3. Click **Manage Form Types**.

### 1.12.1.3 Create New Form Types

Account administrators are able to create new form types. This is a preliminary step to using the Forms modules and is typically done during the initial account configuration. If your account is configured with import capabilities, then you can also import forms. If not, to make the process of creating forms a little easier, it's good to have the hard-copy or electronic form handy so that you have a visual of what the sections and fields of the forms will be. If you do not have an actual form to base this e-Builder form on, it is a good idea to sketch a draft of the form before actually creating it in the system, so that the process is much smoother. Ideally, the questions you should have answered before creating the form are:

- What kind of form are you creating?
- Is this a standard form or a project issue form?
- Should this form be accessible on e-Builder Mobile™?
- What questions make up this form?
- What form fields do you need?

To create a new form type:

1. Go to the Manage Form Types Page. For instructions, see [Access Manage Form Types Page](#).
2. Click **Create New Form Type**. The Create New Form Type page displays.
3. Complete the required fields.
4. Click **Create**. The Sections tab displays.
5. Add the required number of sections. For instructions, see [Manage Form Sections](#).
6. Click **Next**. The Edit Fields tab is selected.
7. Add Form Fields. For instructions, see [Manage Form Fields](#).
8. Click the Preview tab.
9. Review the form for accuracy.
10. Click the Permissions tab to update form permissions. For instructions, see [Manage Form Permissions](#).

Related Topics:

- [Copy Form Types](#)

#### 1.12.1.3.1 Manage Form Properties

To edit form properties:

1. Go to the Manage Form Types Page. For instructions, see [Access Manage Form Types Page](#).
  2. Click the title of the form you want to edit. The Properties tab displays.
-

3. Make the necessary changes. For a description of the fields and buttons on this page, see [Add/Edit Form Type Page Overview](#).
4. Click **Save**.

#### 1.12.1.3.2 Manage Form Sections


Changes to form types will be reflected in all existing and new form type instances on the account.

The following procedures are provided below:

- [Add Form Sections](#)
- [Edit Form Sections](#)
- [Delete Form Sections](#)

### Add Form Sections

Form sections display as tabs in the form instance of the user interface.

 **Note:** It is recommended that you create at least one section. If you do not create a section, all fields will be entered in the “Default” section which is labeled “Custom Fields” on the form when you fill it out.

To add sections to a form:

1. Go to the Manage Form Types Page. For instructions, see [Access Manage Form Types Page](#).
2. Click the **Sections** link under the form you want to edit. The Sections tab displays.
3. Click **Add New Section**. The Edit Form Section(s) page displays.
4. Enter a name for the section in the **Section Name** field.
5. Click **Save**.

### Edit Form Sections

Form sections can be edited by making changes to the name or description of the section.

To edit the sections of a form:

1. Go to the Manage Form Types Page. For instructions, see [Access Manage Form Types Page](#).

2. Click the **Sections** link under the form you want to edit. The Sections tab displays.
3. Modify the name or description of the desired section by typing directly into the field.
4. Click **Save**.

### Delete Form Sections

To delete the sections of a form:

1. Go to the Manage Form Types Page. For instructions, see [Access Manage Form Types Page](#).
2. Click the **Sections** link under the form you want to edit. The Sections tab displays.
3. Click the **Delete** link of the section you want to remove. You are prompted for confirmation.
4. Click **OK**.
5. Click **Save**.

#### 1.12.1.3.3 Manage Form Fields

Changes to form types will be reflected in all existing and new form type instances on the account.

The following procedures are provided below:

- [Add Form Fields](#)
- [Edit Form Fields](#)
- [Delete Form Fields](#)

### Add Form Fields


To add form fields:


1. Go to the Manage Form Types Page. For instructions, see [Access Manage Form Types Page](#).
  2. Click the **Edit Fields** link under the form you want to add fields to. The **Edit Fields** tab displays.
  3. Click **Add New Field**.
-

4. Enter the name of the field in the **Field Name** field.
5. Select the type of fields you are creating from the **Form Type** section.
6. Complete the options that displays for your selected field type.
7. Click **Save**.
8. To assign a section to the field, click the **Section** drop-down arrow and make a section. For instructions on modifying sections, see [Manage Form Sections](#).
9. Click **Save**.

## Edit Form Fields


To edit the fields of a form:

 **Note:** Once a field is created you can edit all options except the field type.

 **Warning:** When you change a field name you are changing it for all the prior form instances.

1. Go to the Manage Form Types Page. For instructions, see [Access Manage Form Types Page](#).
2. Click the **Edit Fields** link under the form you want to edit. The **Edit Fields** tab displays.
3. Make the necessary changes. For a description of the fields and buttons on this page, see [Add/Edit Form Form Fields Page Overview](#).
4. Click **Save**.

## Delete Form Fields

 **Warning:** If you delete a field, you are deleting all the data that has been previously filled in for all form instances across all your projects. This information is non-recoverable.

To delete form fields:

1. Go to the Manage Form Types Page. For instructions, see [Access Manage Form Types Page](#).
2. Click the **Edit Fields** link under the form you want to delete. The **Edit Fields** tab displays.
3. Click the **Delete** link of the field you want to remove. You are prompted for

confirmation.

4. Click **Yes, Delete the Field**.

#### 1.12.1.3.4 Manage Form Permissions

The permissions on a form type are important in determining who has what type of access to a form type. When a form type is initially created, there are no set permissions, although account administrators will be able to see the form. Changes to form types will be reflected in all existing and new form type instances on the account.

To edit the permissions of a form:

1. Go to the Manage Form Types Page. For instructions, see [Access Manage Form Types Page](#).
2. Click the **Permissions** link under the form type. The Permissions tab displays.
3. Make the necessary changes. For a description of the fields and buttons on this page, see [Form Type Permissions Page Overview](#).
4. Click **Save**.

#### 1.12.1.4 Copy Form Types

Copying form types allows you to copy the form type and all of its properties, form fields and permission settings. This is a quick way to create additional form types with similar attributes, and reduce the amount of settings that need to be configured.

To copy form types:

1. Go to the Manage Form Types Page. For instructions, see [Access Manage Form Types Page](#).
  2. Click the title of the form you want to copy. The Properties tab displays.
  3. Click **Copy**.
  4. In the **Form Type Name** field, enter the name of the form type.
  5. Click **Create**. The Properties tab displays.
  6. Make all necessary changes to the new form type.
-




Related Topics:

- [Manage Form Properties](#)
- [Manage Form Sections](#)
- [Manage Form Fields](#)
- [Manage Form Permissions](#)

#### 1.12.1.5 Delete Form Types

Account administrators can delete a form type, and all of their associated instances from their account. Details of the deletion can be viewed by running an audit log report on the Forms module.


 **Warning:** Once deleted, data cannot be recovered.

To delete a form type:

1. Go to the Manage Form Types page. For more information, see [Access Manage Form Types Page](#).
2. Click the title of the form type. The Form Type Properties page displays.
3. Click **Delete**. You are prompted for confirmation.
4. Enter your e-Builder password.
5. Click **Yes, Delete**.

#### 1.12.1.6 Add Form Type Custom Fields

Custom fields are completely configurable and up to the account administrator to define. These fields display on the Add/Edit Form Type Page for administrators to complete. Form type custom fields are useful because they can contain additional information that is not part of the standard form type, which can be pulled into reports to define or separate form type information.

 **Note:** Form type custom fields can also be added under [Global Custom Fields](#).

To add form type custom fields:

1. Click the **Setup** link located in the username drop-down menu. The Setup page displays

2. In the Administration Tools, click **Forms**. All Forms setting options display.
3. Click **Form Type Custom Fields**. The Form Type Custom Fields page displays.
4. Click **Add Field**. The Add Custom Field page displays.
5. Select a data type, and then click **Next**.
6. On the **Custom Field Details** page, enter a name for the custom field in the space provided after **Field Label**.
7. Click **Next**.
8. Review the details of the custom field.
9. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

Or

If details are correct, click **Save**.

#### 1.12.1.7 Manage Form Mail Merge Templates

Mail merge templates allow you to extract data from e-Builder and export it into a Microsoft Word® or Adobe PDF® document. This eliminates the need to enter information into a Word document manually and reduces the margin for error. Having a system-generated document ensures the integrity of your data and it's a quick and easy way to consolidate information you've already entered once, in a ready-to-read format.

In the Forms module, mail merge templates can be created for form details or form logs. The difference between the two are described below:



- **Form Details:** Is a template that includes all the details of the form instance, just as it appears in the interface.
  - **Form Logs:** Is a template that includes only the following basic information: form type name, project name and address, counter number, subject,
-

submitted user information, status, and comments.

The procedures for managing Forms Mail Merge Templates apply to both form details and form logs. Below is a list of procedure that can be taken to manage Forms mail merge templates.

- [Download Default Mail Merge Template](#) Recommended; gives you a template to start with, complete with field mappings.
- [Access e-Builder Field Mappings](#) Provides a list of fields codes that you can use to customize your template with specific form data stored in e-Builder.
- [Customize Form Template with Field Mappings](#) Allows you to add field mappings so you're able to include specific information in each mail merge.
- [Add Form Mail Merge Templates to e-Builder](#) Allows you to add the template to e-Builder and make available for use.
- [Edit Form Mail Merge Templates](#) Allows you to make changes to Form mail merge templates.

#### 1.12.1.7.1 Download Default Forms Mail Merge Template


Although this is not a required part of creating Forms mail merge templates, it is recommended that you download the default template as a starting point. This template can be modified in anyway you choose, but the default is complete with all necessary field mappings. Having a initial template on file also gives you the ability to make necessary changes as they arise, without having to start over from scratch.

To download the default Forms mail merge template:

1. Go to Forms Settings. For instructions, see [Access Forms Settings](#).
2. Expand **Mail Merge Templates**.
3. To create form details merge templates, click **Forms Details**. The Mail Merge Template page displays.

Or

To create form log merge templates, click **Forms Logs**. The Mail Merge Template page displays.

 **Note:** To learn about the difference between Form Details and Form Logs, see [Manage Form Mail Merge Templates](#).

4. Click the **Download Default Mail Merge Template** link.
5. Save this document locally.

\*This is procedure 1 of 4 in creating Forms mail merge templates. The next procedure is [Download e-Builder Field Mappings](#).

#### 1.12.1.7.2 Access e-Builder Field Mappings


Downloading e-Builder field mappings gives you access to the e-Builder field codes used to customize your template, by specifying the e-Builder data you want to include in your mail merge template.

To download e-Builder Field Mappings:

1. Go to Forms Settings. For instructions, see [Access Forms Settings](#).
2. Expand **Mail Merge Templates**.
3. To create form details templates, click **Forms Details**. The Mail Merge Template page displays.

Or

To create form log templates, click **Forms Logs**. The Mail Merge Template page displays.

 **Note:** To learn about the difference between Form Details and Form Logs, see [Manage Form Mail Merge Templates](#).

4. Click the **Go to Mail Merge Field Mappings** link.
  5. Click the **Mail Merge Field Mappings For** drop-down arrow to select a form type. A list of field mappings display.
-

**Tip:** Keep this page open or print the merge codes for easy access when adding the field mappings to your template.

\*This is procedure 2 of 4 in creating Forms mail merge templates. The next procedure is [Customize Form Template with Field Mappings](#).

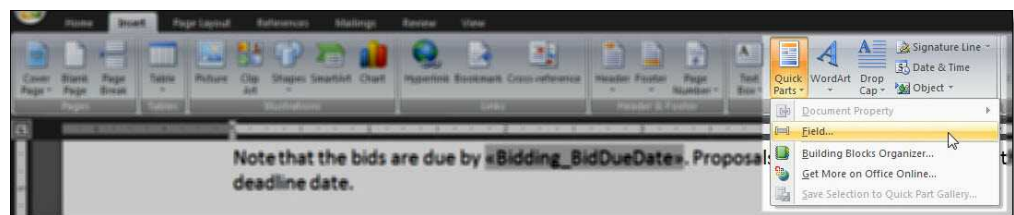
#### 1.12.1.7.3 Customize Form Template with Field Mappings

e-Builder field mappings are available to help you quickly capture data that is stored in the system into your template. Information such as project name, project contact, custom fields, various company information can all be automatically populated into your template. Using field mappings will help you save a lot of time when it is necessary to customize each various templates according to project specifications.

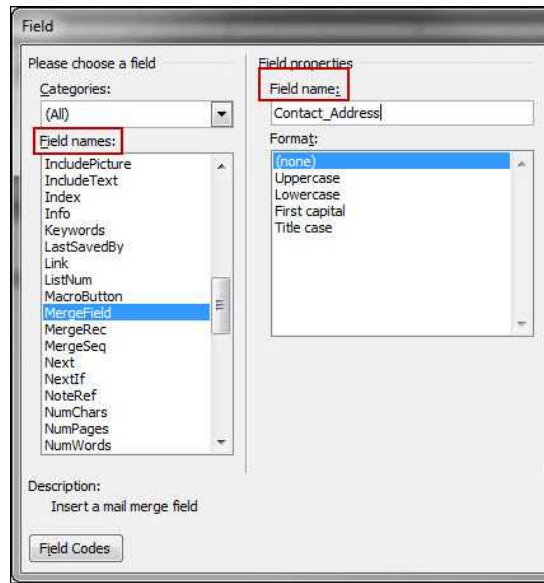
**Note:** In order to customize your template, you should have a list of e-Builder field mappings handy. For instructions see, [Access e-Builder Field Mappings](#).

To add field mappings to your template (Using Microsoft Word 2007 ®):

1. Open the template you want to add field mappings to.
2. Place your cursor in the position you want to add the merge code.
3. Click the **Insert** ribbon.
4. Click the **Quick Parts** drop-down arrow, and then select **Field**.



5. In the **Field names:** section, scroll down and select **MergeField**.



6. Enter the e-Builder merge code in the **Field Name** field.
7. Click **OK**. The merge code is added to the word document.
8. Save the document to your local machine.

\*This is procedure 3 of 4 in creating Forms mail merge templates. The next procedure is [Add Form Mail Merge Templates to e-Builder](#).

#### 1.12.1.7.4 Add Form Mail Merge Templates to e-Builder

 **Note:** Optional pre-requisites for this procedure include:


- [Download Default Forms Mail Merge Template](#)
- [Access e-Builder Field Mappings](#)
- [Customize Form Template with Fields Mappings](#)

To add form mail merge templates to e-Builder


1. Go to Forms Settings. For instructions, see [Access Forms Settings](#).
2. Expand **Mail Merge Templates**.
3. To add a form details template, click **Forms Details**. The Mail Merge Templates page displays.

Or

To add a form log template, click **Forms Logs**. The Mail Merge Templates page displays.

 **Note:** To learn about the difference between Form Details and Form Logs, see [Manage Form Mail Merge Templates](#).

4. Click **Add New Template**. The Add Mail Merge Template page displays.
5. Complete the required fields.
6. Click **Browse** to search for and upload template.
7. In the **Project Assignments** section, select the project(s) to assign the template to.
8. Click the right directional arrow to add the project to the Assigned to these Projects box.

 **Note:** If you do not specify the project(s) that will use this template, the template will be available in all projects.

9. Click **Save**.


#### 1.12.1.7.5 Edit Forms Mail Merge Templates

To edit mail merge templates:

1. Go to Forms Settings. For instructions, see [Access Forms Settings](#).
2. Expand **Mail Merge Templates**.
3. To edit a form details template, click **Forms Details**. The Mail Merge Templates page displays.

Or

To edit a form log template, click **Forms Logs**. The Mail Merge Templates page displays.

 **Note:** To learn about the difference between Form Details and Form Logs, see [Manage Form Mail Merge Templates](#).

4. Click the title of the template.
5. Click **Edit**. The Edit Mail Merge Template page displays.
6. Make the required changes.
7. Click **Save**.

Related Topics:

- [Manage Forms Mail Merge Templates](#)
- [Download Default Forms Mail Merge Template](#)
- [Access e-Builder Field Mappings](#)
- [Customize Form Template with Fields Mappings](#)

## 1.12.2 Forms Settings Page Overviews

### 1.12.2.1 Manage Form Types Page Overview

The Manage Form Types page displays all existing forms types. From here you can also create new form types and access particular sections of existing forms in order to view or modify. A description of the fields and buttons located on this page is provided in the table below.

Field	Description
<b>Filter Form Types</b>	
<b>Project Assignment</b>	<p>Use these options to filter forms based on the projects that they are assigned to.</p> <p><b>All Projects</b> - Filters for forms that are included all projects.</p> <p><b>Selected Projects</b> - Filters for only forms that are included in selected projects.</p> <p><b>Some Blocked Projects</b> - Filters for only forms that are blocked from particular projects.</p> <p><b>Projects Filtered By One or More Custom Field(s)</b> - Filters for forms that are included in projects that include one or more custom fields. Use the custom field drop-down menus and field boxes to specify the custom fields.</p>
<b>Custom Fields</b>	Select a custom field to include in filtered results or enter the custom field.
<b>Filter</b>	Click to filter for select options.
<b>Form Types</b>	
<b>Create New</b>	Click to create a new form type.





<b>Form Type</b>	
<b>Form Title</b>	Click to open the Form Type Properties page and view or modify form properties.
<b>Preview</b>	Click to preview the form.
<b>Sections</b>	Click to modify existing or add new sections to the form.
<b>Edit Fields</b>	Click to open the Edit Form Field(s) page and modify existing or add new form fields.
<b>Permissions</b>	Click to open the Form Type Permissions page to view or modify existing form permissions.
<b>Merge: Details</b>	Click to open the Mail Merge Templates page and view, modify existing, or <a href="#">add new form templates</a> .
<b>Merge Logs</b>	Click to open the Mail Merge Templates page and view, modify existing, or <a href="#">add new form templates</a> .
<b>Description</b>	Displays the description of the form.
<b>Project Assignments</b>	Displays the name of the project(s) the form is assigned to.
<b>Type</b>	Displays whether the form is a static or workflow form. Static forms can not be routed, but workflow forms can. For more information on the difference between these form types, see <a href="#">Types of Forms</a> .

### 1.12.2.2 Form Type Properties Page Overview


The Create New Form Type page allows you to add new form types to the system. A description of the fields and buttons located on this page is provided in the table below.

Field	Description
<b>Create</b> (Add Mode)	Click to create the form after required fields have been completed.
<b>Cancel</b>	Click to disregard changes and return to the Manage Form Types page.

<b>Delete</b> (Edit Mode)	This button is only visible to account administrators. Click to delete the form type and all of its associated instances from the account. Once deleted, data cannot be recovered, but details of the deletion can be viewed by running an audit log report on the Forms module. You will be required to enter your e-Builder password before the deletion can occur.
<b>Copy</b> (Edit Mode)	Click to copy the form type and all of its properties, form fields and permission settings. Copying form types is a quick way to create additional form types with similar attributes, and reduce the amount of settings that need to be configured.
<b>Save</b> (Edit Mode)	Click to save changes to form type properties.
<b>Form Type Name</b>	Enter the name of the form type. For example, RFIs (Requests for Information), Accident Reports, and Lessons Learned.
<b>Description</b>	Enter a description of the form type that tells users how they might utilize the form.
<b>Default "To"</b>	Click to select a person that the form should be sent to by default.  <b>Allow Change to "Default To"?:</b> <b>Yes</b> - Choose to allow users to change the default recipient. This is the default setting.  <b>No</b> - Choose to restrict users from changing the default recipient.
<b>Default "CC"</b>	Click to select a person that the form should CC (carbon copy) by default.  <b>Allow Change to "Default CC"?:</b> <b>Yes</b> - Choose to allow users to change the name of the defaulted CC'd recipient. This is the default setting.  <b>No</b> - Choose to restrict users from changing the default recipient.
<b>Interpret Form As</b>	<b>Standard Form Type</b> - Select to make this form a standard form

	<p><b>Project Issue</b> - Select to make this form a project issue form. See About Project Issues for more information.</p>
<b>Type of Form</b>	<p>Click to make this form a workflow or static form.</p> <p> <b>Note:</b> Once the form has been created this cannot be changed.</p> <p><b>Workflow (Routable Form)</b> - Used when a specific response is necessary from the recipient(s). For example, Workflow forms are used to send someone an item that requires approval or a written answer to a question. Workflow forms use the “ball in court” analogy to indicate who is currently responsible for taking action on an item. Examples include:</p> <ul style="list-style-type: none"> <li>• Requests For Information</li> <li>• Change Orders</li> <li>• Contract Approvals</li> </ul> <p><b>Static (Not Routable)</b> - One-way communications to team members, often communicating the procedural information status of specific items. Static forms are mainly for informational purposes. Examples include:</p> <ul style="list-style-type: none"> <li>• Daily Log Reports</li> <li>• Accident Reports</li> <li>• Fields Observations</li> </ul>
<b>Link Closed Form To</b>	<p>Select another form to link this to when it is in "close" status. When this form is closed the form selected in this option will automatically open to be completed.</p>
<b>Archive Closed Form?</b>	<p><b>No</b> - Select if you do not want to archive these forms when they are completed. This is the default setting.</p> <p><b>Yes</b> - Select to archive the form when closed. Archiving forms places them in a select folder in the Documents module. The form will be saved in the project that the instance is created in.</p> <p> <b>Note:</b> The selection of a project is as a template, all closed instances will not go into that project.</p>

<b>e-Builder mobile Enabled?</b>	Select this check box to make the form available in e-Builder Mobile applications.
<b>Allow comments to be deleted</b>	<p><b>No (Account Default)</b> - Select to keep comments from being deleted. This is the default setting. If you wish to change the default selection, go to Settings &gt; Account Settings, and select the Forms check box.</p> <p><b>Yes</b> - Select to allow the deletion of comments by any user.</p>
<b>Allow Forwarding?</b>	<p><b>Yes</b> - Select to allow the forwarding of these forms. This is the default setting.</p> <p><b>No</b> - Select to keep these forms from being forwarded.</p>
<b>Who Can Close Form?</b>	<p>This field allows you to select who is able to close instances of this form type. As the initiator of a form, you have full access to that form and therefore you're able to close it at any time. In the event that the form initiator switches roles and no longer needs access to this form, this setting allows you to restrict access and grant it to the appropriate parties.</p> <p><b>Initiator</b> - Select to give the form's initiator permission to close the form at any time. This is the default setting.</p> <p><b>Recipient</b> - Select to give the recipient of the form permission to close the form at any time.</p> <p><b>All Roles</b> - Select to give specific roles the ability to close instances of the form type at any time.</p>
<b>Allow Recipient to Close Form?</b>	<p><b>Yes</b> - Select to allow recipients of the form to close it.</p> <p><b>No</b> - Select to keep recipients of the form from closing it. This is the default setting.</p>
<b>Show Due Time?</b>	<p><b>Yes</b> - Select to show recipients the date and time that the form is due.</p> <p><b>No</b> - Select to not show recipients the time that the form is due. This is the default setting.</p>

<p><b>Select Project(s) that Form Type Should be Applied to</b></p>	<p>Use these settings to specify which projects the form will be available in.</p> <p><b>All projects</b> - Select to make this form available in all projects.</p> <p><b>All projects except the following blocked projects</b> - Select to specify the projects that this form should NOT be available in.</p> <p><b>Only the following selected projects</b> - Select to specify specific projects that the form should be available in.</p> <p><b>Projects filtered by one or more custom fields</b> - Select to specify projects based on project custom fields.</p>
<p><b>Prompt User to Notify Participants Upon Editing?</b></p>	<p><b>Yes</b> - Select to prompt users to notify participants when the form is edited. If selected, the following message displays whenever a user saves changes to a form instance:</p>  <p><b>No</b> - Select to disable prompting users to notify participants when the form is edited. This is the default setting.</p>
<p><b>Allow External Comments to be Added After 'Respond By' Date?</b></p>	<p><b>Yes</b> - Select to allow external participants to respond to the form after the 'Respond By' date.</p> <p><b>No</b> - Select to disable responses after the 'Respond By' date has passed. This is the default setting.</p>
<p><b>Allow External Users to View Attached Forms when External</b></p>	<p><b>Yes</b> - Select to allow external participants to view forms that have been attached to this form type when external comments are requested. This would only</p>

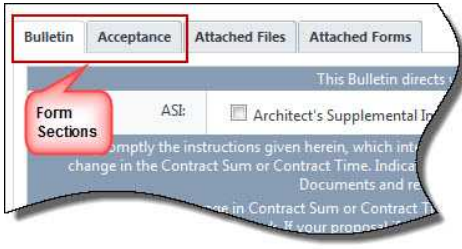
<b>Comment is Requested?</b>	allow them to view attached forms up to one tier. <b>No</b> - Select to prevent external participants from viewing forms attached to the forms they have been requested to comment on.
<b>Allow Comments to be Added when Form is Closed?</b>	<b>Yes</b> - Select to allow comments to be added after the form has been closed. This is the default setting. <b>No</b> - Select to disallow comments to be added after the form has been closed.
<b>Require Folder When Uploading Documents?</b>	<b>Yes</b> - Select to require that users specify a destination folder within e-Builder when they are attaching documents. This is the default setting. This setting is strongly recommended for content tracking and file organization. <ul style="list-style-type: none"><li>Click <b>Lookup</b> to select the destination folder. Unless the '<b>Allow user to place the file in a different folder</b>' check box is selected, this will be the only folder users can upload files to.</li></ul> <b>No</b> - Select to allow users to attach files without having to save them in the e-Builder Documents module.

### 1.12.2.3 Add/Edit Form Sections Page Overview

The Add Form Sections page gives you the ability to add sections to your forms. It is recommended that you create at least one section. If you do not create a section, all fields will be entered in the "Default" section which is labeled "Custom Fields" on the form when you fill it out. You are able to add and modify the sections of a form at any time. These forms will display as tabs in the actual form. Only account administrators and users with 'Manage Forms' permissions are able to modify the sections of a form.

Below is a description of the fields and buttons located on this page. For instructions, see [Manage Form Sections](#).


Field	Description
<b>Add New Section</b>	Click to add a new section to the form. Within form instances, the section display as tabs.

	
<b>Save</b>	Click to save your changes.
<b>Cancel</b>	Click to cancel and return to the <a href="#">Manage Form Types</a> page. All unsaved changes will be lost.
<b>Delete</b>	Click this link to delete the section.
<b>Order</b>	Displays the order that sections display on the forms. These numbers are auto-populated in the order that the sections are entered. To modify, enter whole numbers starting with 1.
<b>Section Name</b>	Displays the name of the section. Start typing within this field to modify.
<b>Description</b>	Displays the description of the section. Start typing within this field to modify.

#### 1.12.2.4 Add/Edit Form Fields Page Overview

The Edit Form Fields page allows you to edit the fields of a form. For specific instructions on editing form fields, see [Manage Form Fields](#).

Field	Description
<b>Copy Field(s)</b>	Click to copy the selected fields. Copied fields are added to the end of the respective section on the list. Use this feature to save time creating similar fields that share the same field type properties (string, text block, integer, radio buttons etc.) The section that the field belongs to and field name can be changed on this page, but the field type cannot.
<b>Add New Field</b>	Click to add a new field.

<b>Save</b>	Click to save changes.
<b>Cancel</b>	Click to cancel and return to the <a href="#">Manage Form Types</a> page. All unsaved changes will be lost.
<b>Delete</b>	Click this link to delete the field. You will then be prompted for confirmation.   <b>Note:</b> Deleting the field will delete all data from existing instances.
<b>Section</b>	Displays the name of the corresponding section. If multiple sections exist, click to change the section of a given field.
<b>Order</b>	Displays the order of the fields for each section. To modify, enter whole numbers starting at 1. By default, the system orders the fields in increments of ten (i.e. 10, 20, 30 and so on). This should leave enough space should you need to go back and add an additional field later, without having to change the numbering of all fields.
<b>Field Name</b>	Displays the name of the field. Type within this field to make changes.
<b>Default Text &amp; Options</b>	If default values were saved for this form field, they display here. Available options for drop down, radio, multipick and checkbox fields also appear, if available.
<b>Type</b>	Displays the field type. Once configured, this cannot be modified.
<b>Max Length</b>	Enabled for string fields only. Enter the maximum character length. By default, a negative value displays, which represents an infinite length.
<b>Rows</b>	Enter the number of rows to display on the form.
<b>Required</b>	Displays whether or not a field is required. Select the check box to make a field required. Clear the check box to make the field optional.
<b>Editable</b>	Displays whether or not a field is editable. Select the check



	box to make a field editable. Clear the check box to make the field read-only.
--	--

#### 1.12.2.5 Preview Form Type Page Overview

This page allows you to preview the final version of the form. You can preview a tab at any time to see what it currently looks like. Click the appropriate tab to make changes to the sections or fields of the form. Form sections display as tabs toward the bottom of the page. If this is the first time the form is being created, you should review the form's permissions for accuracy.

For detailed instructions, see the following:

- [Manage Form Sections](#)
- [Manage Form Fields](#)
- [Manage Form Permissions](#)

#### 1.12.2.6 Form Type Permissions Page Overview

This page allows you to view and modify form type permission settings for different account roles. When a form type is initially created, there are no permissions set, so it is important to set these permissions soon after the form is created. Even with no permissions set, account administrators are still able to see the form.

Form permissions are role specific, and cannot be set for individual users. Add the roles you wish to specify permissions for, and then create your settings for each selection. A description of each field and button is provided in the table below.

Field	Description
<b>OK/Apply</b>	Click to save changes.
<b>Cancel</b>	Click to cancel and return to the <a href="#">Manage Form Types</a> page. All unsaved changes will be lost.
<b>All users may fill out [Form Type Name] even if they do not have Create permissions.</b>	Select to give all users on the account ability to fill out this form type.

<b>Add</b>	Click to open the Add Permissions dialog box and select the account roles you want to set access rights for. For your convenience, you have the choice of specifying permissions on the Add Permissions dialog box or on this page; the same permission check boxes are available on both.
<b>Remove</b>	Click to remove the selected role from the list of roles below.
<b>List Members</b>	Click to open the Members dialog box and view who the members of the selected role are.
<b>View</b>	Select to allow users in the highlighted role permission to view all filled out forms of this type on their projects. (Any author or recipient of a form will be able to see the forms they created/received, regardless of this permission.)
<b>Download</b>	Select to allow users in the highlighted role to download files attached directly to the form. (See also Redline Markup below.)
<b>Comment</b>	Select to allow users in the highlighted role to comment on this form type.
<b>Redline Markup</b>	Select to apply the permissions of the destination folder to the attached files uploaded directly from a user's computer and not from the e-Builder Documents module.  If uploaded from the document folder structure it will assume the permissions of the destination folder.
<b>Modify</b>	Select to allow users in the highlighted role to update dynamic fields of completed forms, even if the form is not in their court. Dynamic fields are those that are editable after the form has been posted.
<b>Create</b>	Select to allow users in the highlighted role to fill out new form instances. If a user does not have this permission, the form type will not be listed when the Fill Out Form button is clicked in the Forms module. Those with this permission will automatically inherit 'View Draft' privileges.

<b>CC Users</b>	Select to allow users in the highlighted role to copy other users when replying, forwarding, or adding a comment to the form type.
<b>View Drafts</b>	<p>Draft forms may be created for many different reasons. For example, multiple RFI's may be created for the same item by different people and the draft form may never be deleted.</p> <p>This permission gives users in the highlighted role the ability to view and take action on draft forms. Everyone is able to see their own draft forms, but to see the drafts of others, this permission setting is required. Also, those with 'Create' permissions automatically inherit 'View Draft' permission.</p> <p>Draft forms are accessible from the Unfinished Drafts page and by filtering for drafts on the Project Forms page.</p>
<b>No Access</b>	<p>This role has no access to this form. This permission overrides any other permissions the user may be granted.</p> <p>Once you have selected your permissions, click Apply.</p>
<b>Apply permissions to existing forms (will only apply changes to the permissions)</b>	Select to apply the permissions you've set, for each user role, to all existing form instances of the selected form type. This setting will apply to all open form instances as well.
<b>Overwrite Permissions (will update all role permissions to match the above)</b>	Select to overwrite existing form type permissions to match the current settings. This setting allows you to reconcile permission inconsistencies and determine exactly which roles have access to different form types.

### 1.12.2.7 Copy Form Type Page Overview

Copying form types allows you to copy the form type and all of its properties, form fields and permission settings. This is a quick way to create additional form types with similar attributes, and reduce the amount of settings that need to be configured. For instructions, see [Copy Form Types](#).

A description of the fields and buttons located on this page is provided in the table below.

Field	Description
<b>Create</b>	Click to create the form after required fields have been completed.
<b>Cancel</b>	Click to disregard changes and return to the Manage Form Types page.
<b>Form Type Name</b>	Enter the name of the form type. Example form types include RFIs (Requests for Information), Accident Reports, and Lessons Learned.
<b>Description</b>	Enter a description of the form type that tells users how they might utilize the form.

#### 1.12.2.8 Form Type Custom Fields Page Overview

Custom fields are definable fields that drive the reporting needs of your organization. They are available throughout different modules within e-Builder. Custom fields allow you to group, filter, or categorize information according to specific business processes in your reports.

Field	Description
<b>Reorder</b>	Click to open the Reorder Form Type Custom Field page and change the order that custom fields display.
<b>Add Field</b>	Click to open the Add Custom Field page and add a form custom field.
<b>Field Dependencies</b>	Click to add field dependencies. Field dependencies allow you to associate custom fields to one another. For more information, see <a href="#">Field Dependencies</a> .
<b>Edit</b>	Click to open the Edit Custom Fields page and modify the details of the custom field.
<b>Delete</b>	Click to delete the custom field. You are prompted for confirmation.
<b>Label</b>	Displays the title of the custom field name.

<b>Data Type</b>	Displays the custom field type.
<b>Permission</b>	Displays the custom field permissions.
<b>Unique</b>	Displays whether or not the custom field is unique. Unique form type custom fields are those that cannot be duplicated in other projects.
<b>Last Modified By</b>	Displays the name of the last user that made changes to the field.

## 1.13 Global Custom Fields

### 1.13.1 About Global Custom Fields

Custom fields are definable fields that drive the reporting needs of your organization. They are available throughout different e-Builder modules. Custom fields allow you to group or filter information according to specific business processes in your reports. In some cases, an organization may not require any custom fields at all. Although custom field settings are available in the Setup area for each respective module, the Global Custom Fields area offers the advantage of applying custom fields to multiple areas of e-Builder at one time.

For instructions, see one of the following:

- [Add Global Custom Fields](#)
- [Import Global Custom Fields](#)

### 1.13.2 Access Global Custom Fields Page

To access the Global Custom Fields page:

1. From the Top Navigation Tabs, click the **Setup** tab. If the Setup tab is not visible, click the Plus tab to select the Setup Link or add it to the Top Navigation Tabs.
2. In the **Administration Tools** section, click **Global Custom Fields**.

### 1.13.3 Set Up Document Custom Field Import File

Document custom field imports are compatible with Microsoft Excel® .xls and .xlsx files. A single import file can include custom fields for multiple projects. The distinction will be made by the value of the project identifier being used in the

import file. The image below includes the name of all fields that can be added to the header row of the spreadsheet. This image is also of the mapping step that will be encountered during the import. If the headers in your file match these fields exactly, they will auto-populate. If the header names are different, you must map the corresponding columns in your spreadsheet to the e-Builder built-in fields in step 2 of the import wizard. The 'Document Custom Fields' section lists all available document custom fields on the account. These field labels should also be column headers in the file.

Step 2 of 3

**Import Document Custom Fields - Field Mappings**

---

**Document Built-In Fields** Previous Next Cancel

<p>* Project Identifier: <input type="text" value="Project Identifier"/></p> <p>* File Name: <input type="text" value="File Name"/></p> <p>Description: <input type="text"/></p>	<p>* Folder Path: <input type="text" value="Folder Path"/></p> <p>File Version: <input type="text"/></p> <p>Document Type: <input type="text" value="Document Type"/></p>
--	---

**Document Custom Fields**

Plan Room Menu: <input type="text"/>	
Trade: <input type="text"/>	
Zone: <input type="text"/>	
Department: <input type="text"/>	
Category: <input type="text"/>	
Floor: <input type="text"/>	

Previous Next Cancel

## Description of Required and Optional Fields for Import File

e-Builder Field Name/ Import File Column Header	Description	Required/Optional
<b>Project Identifier</b>	<p>Select a Project Identifier. This is a unique ID that will identify which project the document custom field is associated with. Examples include project name and project number.</p> <p>To learn more about project numbers, see <a href="#">Create Project Number Custom Field</a>.</p>	<b>Required</b>

<b>File Name</b>	Include the name of the file exactly as it is saved in the Documents folder structure, including the file extension.	Required
<b>Folder Path</b>	Enter the folder path that the file the currently saved in, such as Documents/Construction/Specifications.	Required
<b>Description</b>	Enter a description for the custom field value. Blank values will not change existing entries, however, new values will overwrite existing ones.	Optional
<b>File Version</b>	Enter the file's version number	Optional
<b>Document Type</b>	Enter the document type in this field. Blank values will not change existing entries, however, new values will overwrite existing ones.	Optional
<b>Document Custom Fields</b>	By default, all available document custom fields display on the Field Mappings page, as illustrated in the above image. Make the custom field labels, column headers and enter the desired value in the appropriate columns.	Optional

#### 1.13.4 Import Document Custom Fields

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Document Import' Permission*

**Prerequisite:** [Set Up Document Custom Field Import File](#)

Document custom fields can be imported for multiple projects at a time. When

document control is enabled on a project, participants have the opportunity to complete document custom fields at the time of upload. However, non-required fields may not always be entered. Also, administrators may feel more comfortable completing these fields to ensure consistency. Importing document custom fields is a great time-saving tool that allows you to manage these fields more easily.

To import document custom fields:

1. Click **Documents** from the Top Navigation tabs.
2. In the Quick Links menu located in the upper right corner of the page, click **Import Document Custom Fields**.
3. Click **Browse** to search for and select the import file.
4. Click **Next**.
5. If necessary, map the e-Builder built-in fields to the corresponding fields in the import file. To learn more, see [Set Up Document Custom Field Import File](#).
6. Click **Next**.
7. Review the import summary. If there are exceptions, click **Previous** to make necessary changes.

Or

If there are not necessary changes, click **Import**.

### 1.13.5 Add Global Custom Fields


Custom fields are definable fields that drive the reporting needs of your organization. They are available throughout different e-Builder modules. Custom fields allow you to group or filter information according to specific business processes in your reports. In some cases, an organization may not require any custom fields at all. Although custom field settings are available in the Setup area for each respective module, the Global Custom Fields area offers the advantage of applying custom fields to multiple areas of e-Builder at one time.

To add global custom fields:

1. Click the **Setup** link.
  2. In the **Administration Tools** section, click **Global Custom Fields**.
-



3. Click **Add Field**. The Add Custom Field page displays.
4. Select the check box(es) next to the e-Builder object you want to add the custom field to.
5. Click **Next**.
6. Select a data type radio button, and then click **Next**.
7. Enter the required fields, and then click **Next**.
8. Click **Save** to complete the process or **Save & Add** to add more fields.

 **Tip:** It is recommended that you go into the modules you've created custom fields for to ensure they display in the order you want them to be filled out.


For specific information on custom fields for a particular module, or for steps on adding custom fields from each respective area, see the following:

- [Bidding Custom Fields](#)
- [Calendar Custom Fields](#)
- [Cost Custom Fields](#)
- [Document Custom Fields](#)
- [Form Type Custom Fields](#)
- [Process Custom Fields](#)
- [Schedule Custom Fields](#)
- [Submittal Custom Fields](#)

Related Topics:

- [Field Dependencies](#)

### 1.13.6 About Custom Field Dependencies

 **Note:** Custom field dependencies can only be created with multi-pick lists and drop-down list custom fields because dependencies are created based on the values of these fields.

Custom field dependencies allow you to specify a controlling field, that when selected will display specific options for project participants to choose from. Narrowing down the options for users to choose from makes completing custom fields less daunting and more efficient. Making these associations further insures that proper data is being collected, which in turn strengthens report data. Field dependencies also speed up the manual effort required to complete custom fields as new projects are created.

### For Example:

If your organization builds for a Healthcare System with various hospital projects going on, you might have a custom field for Medical Center and another for On-Site Lab. Custom field dependencies would allow you to display only the labs which are appropriate for a specific medical center. The custom fields and values for each might be as follows:

Custom Fields (CF)		
	Medical Centers:	On-Site Labs:
CF Values	Emergency Room	Radiology
	Urgent Care	Blood Tests
	Genetics	DNA
	Toxicology	

For an Emergency Room, it might make sense to have the Radiology and Blood Test labs available. However, for the Toxicology Center, the Blood Test lab might be the only one that applies. In addition to this, the Genetics Center might only need a DNA lab.

#### Medical Center

Emergency Room

#### On-Site Lab

Radiology ✓

Blood Tests ✓

DNA

#### Medical Center

Toxicology

#### On-Site Lab

Radiology

Blood Tests ✓

DNA

#### Medical Center

Genetics

#### On-Site Lab

Radiology

Blood Tests

DNA ✓

## Terminology

**Step1:** Choosing the **Controlling** and **Dependent** Fields



**Add Custom Field Dependency**

**Select Fields**

\* Select a Controlling field: Medical Center

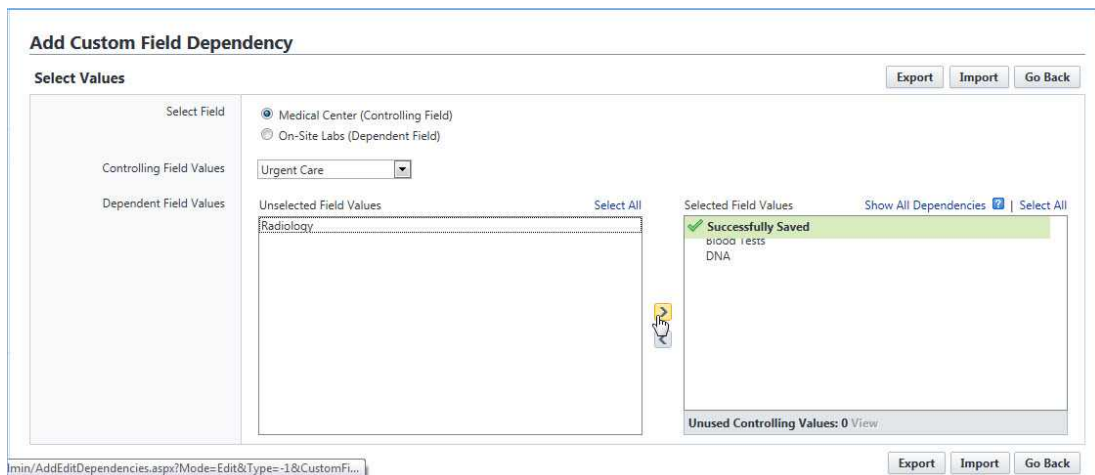
\* Select a Dependent field: On-Site Labs

When setting up field dependencies you will have to choose the controlling and dependent field. The **controlling field** is the primary field of selection that will determine the available options of a subsequent field, which is referred to as the **dependent field**. From the examples above, the controlling field would be Medical Centers, and On-Site Labs would be the **dependent field**.

## Assigning Field Dependencies

### Step 2: Assigning field dependencies

When a controlling or dependent field is selected, its values populate the subsequent drop-down menu. Once a value is selected, such as 'Medical Center,' values of the converse field populate for you to choose the dependent relationship. Selected field values save automatically. For instructions, see [Add Field Dependencies](#).



**Add Custom Field Dependency**

**Select Values** Export Import Go Back

Select Field:  Medical Center (Controlling Field)  On-Site Labs (Dependent Field)

Controlling Field Values: Urgent Care

Dependent Field Values: Unselected Field Values: Radiology Select All


Selected Field Values: Show All Dependencies Select All

Successfully Saved  
blood tests  
DNA

Unused Controlling Values: 0 View

[Admin/AddEditDependencies.aspx?Mode=Edit&Type=-1&CustomFi...](#) Export Import Go Back


### 1.13.7 Add Field Dependencies

 **Note:** Custom field dependencies can only be created with multi-pick lists and drop-down list custom fields because dependencies are created based on the values of these fields.

Custom field dependencies allow you to specify a controlling field, that when selected will display specific options for project participants to choose from. You do not have to select a dependency for each of the field values. Blank fields will be treated as if there is no field dependency assigned and users will be presented with all the values available for the custom field. To learn more, see [About Custom Field Dependencies](#).

To add custom field dependencies:

1. Go to the Global Custom Fields page. For instructions, see [Access Global Custom Fields Page](#).
2. Click **Field Dependencies**.
3. Click **Add Dependency** to set up the relationship.
4. Select the controlling and dependent fields.

 **Note:** The controlling field is the primary field of selection that will determine the available options of a subsequent field, which is referred to as the dependent field. For examples or to learn more, see [About Custom Field Dependencies](#).

5. Click **Next**.
6. Map the dependencies as appropriate to each controlling field. Values of the controlling field display as the header of the table. Values of the dependent fields are listed vertically.
7. Click **Save** to complete this task.

Or


**Save & Add** to add another field dependency.

### 1.13.8 Download Custom Field Dependency Template

Before importing custom field dependencies you're able to download a template that includes the values of the controlling and dependent fields. This template will make it easier for you to make edits as the values (which can be many in some

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cases) will be available in the tabs of the spreadsheet.

 **Note:** Custom field dependencies can also be [exported](#) in Excel format.

To download the custom field dependency template:

1. Go to the Global Custom Fields page. For instructions, see [Access Global Custom Fields Page](#).
2. Click **Field Dependencies**. The Global Custom Field Dependencies page displays.
3. To download a template for an established custom field dependency, click the **Edit** link next to the custom field.

Or

To download a template for a new custom field dependency, click **Add Dependency**. The Add Custom Field Dependency page displays.

Select your controlling and dependent fields, and then click **Next**.



**Add Custom Field Dependency**

**Select Fields**

\* Select a Controlling field: Medical Center

\* Select a Dependent field: On-Site Labs

The Add Custom Field Dependency page displays.

4. Click **Import**. The Import Data Field Dependencies submenu displays.



5. Click the **Download Template** link.

Related Topics:

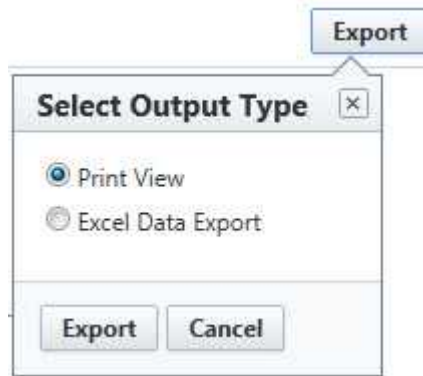
- [Export Custom Field Dependencies](#)
- [Import Custom Field Dependencies](#)
- [Add/Edit Custom Field Dependency Page Overview](#)

### 1.13.9 Export Custom Field Dependencies


Custom field dependencies can be exported in a print preview or an editable Excel spreadsheet. The export feature affords you the flexibility of modifying custom field dependencies offline for import back into e-Builder. This also enables you to share data with external users more easily.

To export custom field dependencies:

1. Go to the Global Custom Fields page. For instructions, see [Access Global Custom Fields Page](#).
2. Click **Field Dependencies**. The Global Custom Field Dependencies page displays.
3. Click the **Edit** link next to the custom field.
4. Click **Export**. The Import Data Field Dependencies submenu displays.



5. To export a print view, select the **Print View** option. This option does not allow you to edit data.

 **Tip:** If you are waiting for a large list of field dependencies to be downloaded, use this option to see a full list more quickly.

6. Click **Export**.

Related Topics:

- [Import Custom Field Dependencies](#)
- [Add/Edit Custom Field Dependency Page Overview](#)

### 1.13.10 Import Custom Field Dependencies

Importing custom field dependencies makes them easier to manage, especially when you are working with a large list. To give you a starting point, a downloadable template is available that is pre-populated with the values of the controlling and dependent field values. This template can be [downloaded](#) or [exported](#).

To import field dependencies:

1. Go to the Global Custom Fields page. For instructions, see [Access Global Custom Fields Page](#).
2. Click **Field Dependencies**. The Global Custom Field Dependencies page displays.
3. To import dependencies of a saved custom field dependent relationship, click the **Edit** link next to the fields you want to import or export dependencies for.

Or

To import dependencies for a new field dependent relationship, click **Add Dependency**. The Add Custom Field Dependency page displays.

Select your controlling and dependent fields, and then click **Next**.



The Add Custom Field Dependency page displays.

4. Click **Import**. The Import Data Field Dependencies submenu displays.



**Note:** To make updates using a template that is pre-populated with the values of the selected controlling and dependent fields, click the **Download Template** link. For instructions, see [Download Custom Field Dependency Template](#).

5. Click **Browse** to import an Excel spreadsheet of the data field dependencies.
6. Click **Import**.



### 1.13.11 Add/Edit Custom Field Page Overview

Use this page to add new custom fields or make changes to existing ones. When adding custom fields, you are taken through a three step wizard. For instructions, see [Add Document Custom Fields](#). A description of the fields and buttons located on each page is located in the table below:

<b>Step 1 of 3</b> <b>Select Data Type:</b>	
Select the type of data field you'd like to add. A description of each option is below.	
<b>String</b>	Allow users to enter a single line of text.
<b>Text Block</b>	Allow users to enter multiple lines of text.
<b>Integer</b>	Allow users to enter only a numeric value.
<b>Decimal</b>	Allow users to enter only decimal values.
<b>Drop Down List</b>	Allow users to select one value from a list of values
<b>Multiple Pick List</b>	Allow users to select any number of values from a list of values
<b>Date</b>	Allow users to enter a date manually, or select from the calendar icon.
<b>Account User</b>	Allow users to select a single user from a list of all users on the account.
<b>User In Role</b>	Allow users to select a single user from a list of users in the selected role.
<b>User In Role On Project</b>	Allow users to select a single user from a list of users in the selected role that are members of the current project.
<b>Step 2 of 3</b> <b>Add Custom Field</b>	
Use this page to enter custom field details.	
<b>Previous</b>	Click to return to the previous page.

<b>Next</b>	Click to go to the next step of the field creation process.
<b>Cancel</b>	Click to cancel and return to the Custom Fields page. All data will be lost.
<b>Field Label</b>	Enter a label for the custom field.
<b>Description</b>	Enter a description of the custom field.
<b>Inheritable</b>	This field displays when User and Project data types are selected. Select this check box to make the values of either the project or user custom field available when a user or project is copied. This will allow you to maintain consistency in the application of custom fields, which will provide additional data for your reporting needs.
<b>Required</b>	Select to make this a required field. Leave clear to make this an optional field.
<b>Default Value</b>	Enter a default value for the field.
<b>Permissions</b>	<p><b>Admin Edit Only</b> - Select to make this field editable to Account Administrators only.</p> <p><b>All Users</b> - Select to make this field editable for all users on the account.</p> <p><b>Role Name</b> - For each role, select the view or edit permission, which will allow the selected role to either have only view permission or grant them edit permissions.</p>
<b>Maximum Length</b>	Displays for String fields only. Enter the maximum number of character that users can enter in this field. If left blank, a negative value is automatically entered, which is equal to an infinite number of characters.
<b>Minimum Length</b>	Displays for String fields only. Enter a least amount of characters that users can enter in this field.
<b>Visible Rows</b>	Displays for Text Block and Multiple Pick List fields only. Enter the number of visible rows you want to display in the scrollable window. Team members will have to scroll to see the additional options.
<b>Length</b>	Displays for Text Block fields only. Enter the maximum number of character you'd like available for this field.
<b>Decimal Places</b>	Displays for Decimal fields only. Enter the amount of decimal places to set this field to, for example, two (0.12) or four

	(0.1234) decimal places.
<b>Drop Down List Options</b>	Displays for Drop-Down fields only. Enter the options that users should choose from. Enter one option per line.
<b>Sort Values</b>	Displays for Drop-Down and Multiple Pick List fields only. Click to sort values in alphabetical order.
<b>Multiple Pick List Options</b>	Displays for Multiple Pick List fields only. Enter the options that users will choose from. Enter one option per line.
<b>Roles</b>	Displays for 'User in Role' and 'User in Role on Projects' fields only. Select a role to narrow the list down by the users in the role selected.
<b>Step 3 of 3 (Field Summary and Preview)</b>	
This page displays the details of the custom field and allows you to see a preview of what the field will look like to end users.	

### 1.13.12 Add Custom Field Dependency Page Overview

This page allows you to choose the controlling and dependent fields of the custom field dependency relationship. The controlling field is the primary field of selection that will determine the available options of a subsequent field, which is referred to as the dependent field. For examples and to learn more, see [About Custom Field Dependencies](#).

For instructions, see [Add Document Custom Field Dependencies](#).

Below are descriptions of the fields and buttons located on this page:

Field	Description
<b>Next</b>	Click to move to the next step in the process.
<b>Cancel</b>	Click to discard changes.
<b>Select a Controlling field</b>	Click to select the controlling field. The controlling field is the primary field of selection that will determine the available options of a subsequent field, which is referred to as the dependent field. For more information, see <a href="#">About Custom Field Dependencies</a> .
<b>Select a</b>	Click this drop-down arrow to select the dependent field.

<b>Dependent field</b>	The dependent field is a subsequent field, whose values will display as a result of the selected controlling field. For more information, see <a href="#">About Custom Field Dependencies</a> .
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### 1.13.13 Add/Edit Custom Field Dependency Page Overview

This page allows administrators to establish field-dependent relationships based on the values of the controlling and dependent field selected on the [Add Custom Field Dependency](#) page. Multiple associations can be created from this page. An export option is available and it allows you to export field dependency data to an Excel spreadsheet. Additional associations can be added to the file and then imported back into e-Builder to simplify the process. The import/export options are ideal for working with a large number of custom field dependencies and will help you disseminate the information to other members of your organization more easily. To learn more about custom field dependencies, see [About Custom Field Dependencies](#).

The following actions can be taken from this page:

- [Add Document Custom Field Dependencies](#)
- [Import Field Dependencies](#)
- [Export Field Dependencies](#)

Below are descriptions of the fields and buttons located on this page:

Field	Description
<b>Export</b>	Click to export the list of field dependencies to an Excel spreadsheet or in Print.
<b>Import</b>	Click to import an Excel spreadsheet of field dependencies.
<b>Previous</b>	Click to return to the <a href="#">Add Custom Field Dependency</a> page, where you are able to select the controlling and dependent fields. All unsaved changes will be lost.
<b>Save</b>	Click to save changes.
<b>Save &amp; Add</b>	Click to save and add another field dependency.

<b>Cancel</b>	Click to discard changes.
<b>Select Field Type</b>	<p><b>(Controlling Field):</b> The name of the custom field precedes this label. When this option is selected, the values of this field populate the drop-down menu; from which you are able to choose the value to add dependent fields to. A list of dependent field values display in the 'Unselected Field Values' panel.</p> <p><b>(Dependent Field):</b> The name of the custom field precedes this label. When this option is selected, the values of this field populate the drop-down menu; from which you are able to choose the value to add controlling fields to. A list of controlling field values display in the 'Unselected Field Values' panel.</p> <p>To learn more about controlling and dependent fields, see <a href="#">About Custom Field Dependencies</a>.</p>
<b>Controlling Field/ Dependent Field</b>	<p>The label that appears next to the drop-down menu is contingent on the option that's selected in the 'Select Field' field.</p> <p>The drop-down menu includes the values of the selected field (controlling or dependent ). The 'Unselected Field Values' panel lists the values of the opposite field, from which you can choose which to associate with the value selected in this drop-down menu.</p>
<b>Show All Dependencies</b>	Select this check box to see all of the established dependencies in the 'Selected Field Values' panel.
<b>Unselected Field Values</b>	This panel lists all the values of the unselected field. Make a selection from this list to associate with the values of the selected field. Click the right-directional arrow to add your chosen values to the adjacent 'Selected Field Values' panel.
<b>Selected Field Values</b>	Lists all selected values. Select the 'Show All Dependencies' check box to see a list of the all the established dependencies.

## 1.14 Individual License Manager

The Individual License Management feature in e-Builder gives e-Builder clients the ability to manage both contracted and individual licenses from within the e-Builder interface. A contracted license is the same as the traditional e-Builder license, except you contract it out to your vendors for a predetermined amount of time of your choice. Individual licenses, on the other hand are offered to your vendors at a price determined by your organization. Individual licenses are available for yearly subscriptions.


Below are tasks associated with managing individual licenses in e-Builder:

- [Add Licensed Users](#)
- [Send Message to Users](#)
- [View License History](#)

### 1.14.1 Add Licensed Users

To add a licensed user:

1. Go to the Manage Users page. For steps, See [Access Manage Users Page](#).
2. Click **Add New User**.
3. Complete the following required fields:

 **Note:** Optionally, you can pre-populate any known information for your users in the Business Information section to make this process easier for them when they purchase their license and log in to e-Builder for the first time. Users can overwrite this information if they choose.

4. Select the **Notify user that he/she has been added** check box to send a notification email to the user that includes their username and password.

You can also send the notification at a later time; for steps, see [Send Message to Users](#).

5. Click **Save**.

### 1.14.2 Send Message to Users

You can send email messages to your users at any time. You can also send one message to multiple users at a time. If you did not choose to send a notification of e-Builder membership at the time the user was added, you can do so by following the steps below.

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To send a message to your users:

1. Go to the Manage Users page. For steps, See [Access Manage Users Page](#).
2. Select the check box next to the user's name(s).
3. Click **Email User**.
4. To notify users of e-Builder membership and/or to send user name and passwords:
  - Select the **Notify user that he/she has been added** check box.
  - Select the **Include username and password** check box.
5. Complete all required fields.
6. Click **Send**.

### 1.14.3 View License History

A user's license history lists all activity concerning individual user licenses. Purchases, license transfers, and modifications such as updating license expiration dates can be accessed from the License History tab.

To view a user's license history:

1. Go to the Manage Users page. For steps, See [Access Manage Users Page](#).
2. Click the user's name.
3. Click the **License History** tab.

### 1.14.4 Renew e-Builder License

Individual license subscriptions are valid on an annual basis and licenses can be purchased for multiple years. 30 days prior to the license expiration date you will receive an expired license warning message when you attempt to log in to e-Builder. A counter will alert you of the number days left in your subscription.

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For 30 days, this message will display every time you log in to e-Builder until your subscription expires; at which point you will have the option to renew or exit the system.



### 1.14.5 Individually Licensed User Registration Guide

You have been added as an individually licensed user in e-Builder, our capital program management software! To access this tool and begin working, please complete the account registration and purchase your license by following the steps below.


#### Complete e-Builder Account Registration

You will receive an email regarding your new e-Builder membership. Enclosed will be your username and temporary password. Follow the steps below to complete your account registration.

1. Open the new account notification email from e-Builder.
2. Click the enclosed link. The e-Builder Members Login page displays.



3. Enter your username and temporary password.
4. Click **Login**. The License Information page displays.
5. Review license information.

 **Note:** License duration is set to 1 Year by default. Click the drop-down arrow to choose a longer duration.

6. Click the Terms and Policy link to review e-Builder's terms and policy.
7. Select the Terms and Policy check box.
8. Click **Proceed to Checkout**. The Payment Method page displays.
9. Enter credit card information.
10. Click **Purchase**.
11. Review purchase summary, then click **Continue to e-Builder**.
12. Read the terms of use, and then click **I Agree**. The Update User Profile page displays.
13. At a minimum, complete all required fields, and then click **Save**. The Change Password/Security Questions page displays.
14. Complete all required fields, and then click **Save Changes**.

Related Topic:

- [Renew e-Builder License](#)

## 1.15 Mail Merge Templates

Mail merge templates allow you to extract data from e-Builder and export it into a Microsoft Word® or Adobe PDF® document. By mapping certain fields in the Word document to data fields in select e-Builder modules, you are able to export files with just the data you need, such as project names and other identifiers. The Word document template can be formatted in any way you desire to meet your requirements for reporting or printing. The account administrator is responsible for setting up and maintaining mail merge templates. The benefit of mail merge

templates is that it eliminates the need for users to enter information into a Word document manually and reduces the margin for error. Having a system-generated document ensures the integrity of your data and it's a quick and easy way to consolidate information you've already entered once into a ready-to-read format.

Although default templates are available, you have the option of customizing templates with field mappings that will allow you to extract information stored in e-Builder into your template such as company contact information, project name, user information etc. For steps on customizing your templates, see [Customize Template with Field Mappings](#).

Mail merge templates are available for most e-Builder modules and generally serve the same purpose. However, for specifics on how and where in the user interface the template is used, and detailed steps for adding and editing each template, see details for each respective module by clicking the appropriate link below:

- [Bidding Fax Cover Sheets](#)
- [Budget Mail Merge Templates](#)
- [Calendar Mail Merge Templates](#)
- [Cost Mail Merge Templates](#)
- [Forms Mail Merge Templates](#)
- [Planning - Scenario Templates](#)
- [Processes Mail Merge Templates](#)
- [Schedule Mail Merge Templates](#)
- [Submittal Mail Merge Templates](#)

Related Topics:

- [Customize Template with Field Mappings](#)

### 1.15.1 Customize Template with Field Mappings

e-Builder field mappings are available to help you quickly capture data that is stored in the system into your template. Information such as project name, project contact, custom fields, various company information can all be automatically populated into your template. Using field mappings will help you save a lot of time when it is necessary to customize each various templates according to project specifications.

To customize your template using field mappings:

- [Obtain Field Mappings](#)
  - [Add Field Mappings to your Template](#)
-

## Obtain Field Mappings:

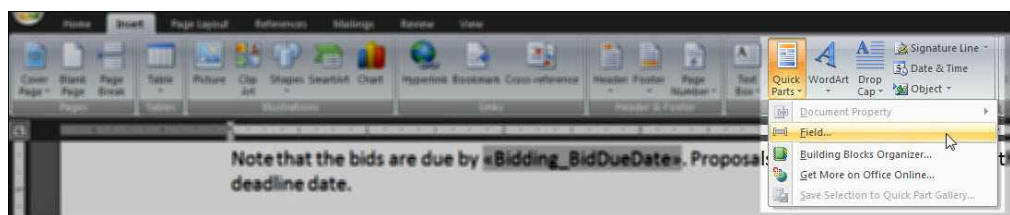
1. Click the Setup link.
2. In the Administration Tools section, click the module name you want to customize the template for.
3. Click **Mail Merge Templates** or **Fax Cover Sheet**. The Mail Merge Templates page displays.
4. Click the **Go to Mail Merge Field Mappings** link.

Name ^	Description	Type	File Name	Project Assignment	Status	Output	Created By	Date Created
Calendar Mail Merge Template		Calendar	Calendar Mail Merge Template.doc		Draft	Doc	Sylverne, Benouchka	11.17.2011

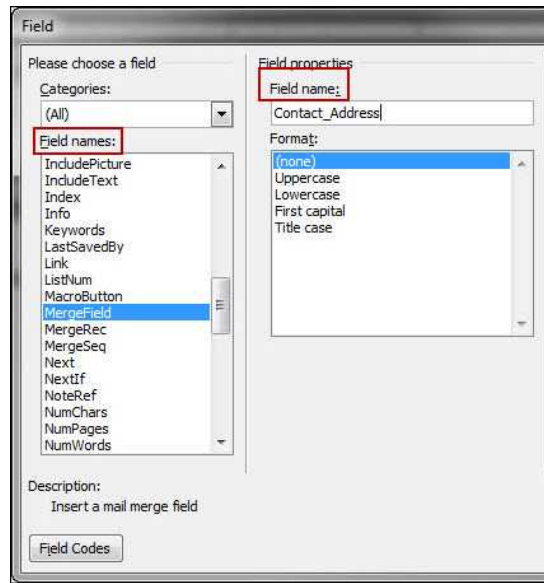
**Tip:** Keep this page open or print the merge codes for easy access when adding the field mappings to your template.

## Add Field Mappings to your Template (Using Microsoft Word 2007®):

1. Open the template you want to add field mappings to.
2. Place your cursor in the position you want to add the merge code.
3. Click the **Insert** ribbon.
4. Click the **Quick Parts** drop-down arrow, and then select **Field**.



5. In the **Field names:** section, scroll down and select **MergeField**.



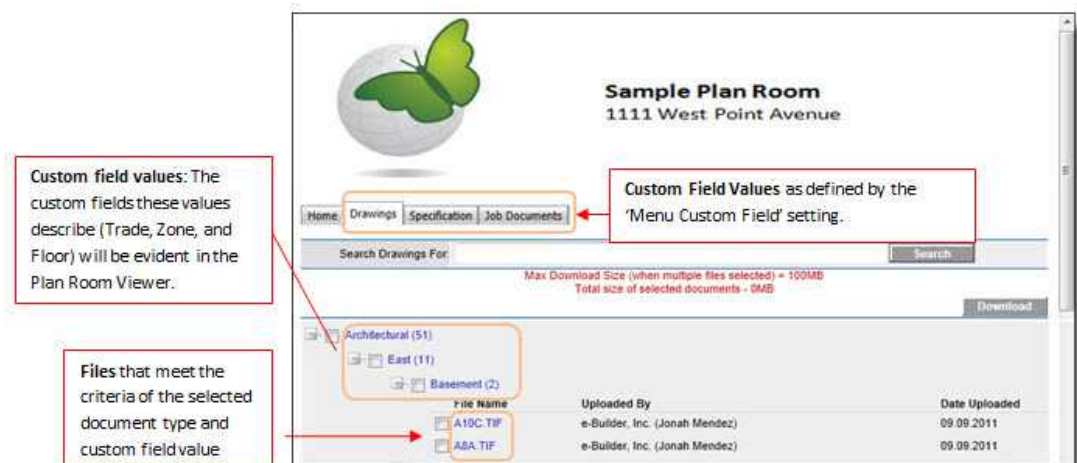
6. Enter the e-Builder merge code in the **Field Name** field.
7. Click **OK**. The merge code is added to the word document.
8. Save the document to your local machine.
9. To store this document as a template in e-Builder, see the respective mail merge template module below:
  - [Bidding Fax Cover Sheets](#)
  - [Calendar Mail Merge Templates](#)
  - [Cost Mail Merge Templates](#)
  - [Forms Mail Merge Templates](#)
  - [Planning - Scenario Templates](#)
  - [Processes Mail Merge Templates](#)
  - Schedule Mail Merge Templates
  - [Submittal Mail Merge Templates](#)

## 1.16 Plan Room

### 1.16.1 About the Plan Room

The e-Builder Plan Room gives all project participants including architects, engineers, bidders and contractors access to files without having to know exactly where files are located. By simply knowing the document type they're looking for (e.g. drawings, specifications, job documents, ASIs etc.) users can easily access project files as well as related files specific to a trade, floor or zone, for example. These document specifications are referred to in e-Builder as document custom fields, definable by you, the administrator. e-Builder leverages document custom fields to control how the plan room organizes and relates files. Part of plan room setup includes defining document types, custom fields and custom field values to help users quickly and easily navigate to the files they need.

Below is an illustration that provides a high level view of the plan room. Each section is labeled by its e-Builder setup definition to help you visualize and understand the use of the settings you will configure in order to make the plan room functional for users.



When a file is selected in the plan room, it opens in the Plan Room Viewer where users can easily “jump” to other files that share the same custom field values. The left navigation pane lists all related files grouped by document types.

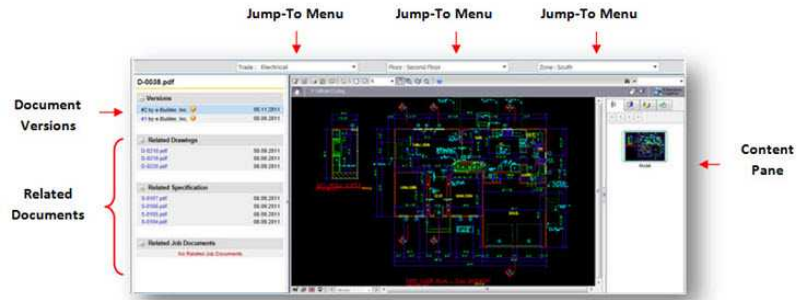


Figure 2: Plan Room Viewer

- The **Related Documents** pane is compiled by defining document relationships. See [Define Relationships](#) for instructions. Initially, the administrator may establish these relationships, but on an ongoing basis this may be the responsibility of the Project Document Controller.
- **Jump-To Menus** and their values are defined during the process of configuring documents to use the plan room. See [Plan Room Enable Documents](#) for instructions. Before you can enable documents to use the plan room, document types and custom field values must first be defined.
- **Document Types** are the first level of access users have to the plan room. Document types help you categorize your files. See [Define Document Types](#) for instructions.
- **Custom Fields** and their values are attributes of a document that help further describe it and its purpose. Examples of document custom fields might include *trade*, *floor*, *zone* etc. as seen in Figure 1. Custom field values broaden the scope by which users can find the documents they need. These values display in the expanded menus in the plan room and in the Jump-To drop-down arrows (see Figure 2). For instructions on defining custom fields, see [Define Document Custom Fields](#).

For instructions on setting up the plan room, see [Plan Room Setup](#).

### 1.16.2 Plan Room Benefits

- **Secure Document Sharing** – Use Plan Room to share plans, drawings, specifications and other job-related documents, such as bid sets and ASIs. The Plan Room must be enabled on a project-by-project basis to be a public or

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password-protected site with its own web address that can be distributed to project participants. It can also be configured to be used in the bidder portal to distribute bid documents.

- **Organize Documents Specific to each Project** – Plan Room allows you to organize project documents with different attributes or tags. Tags might be building name, floor number, section, zone, or even trade. Once the document type is chosen (e.g. plans), the user will get a menu that lets him or her find plans by tag. The Plan Room viewer lets the user “jump” to other similar documents by varying one tag, speeding up the time it takes to find related files. For example, if you are looking at the first floor zone 1 architectural drawing, the user can easily look at the equivalent drawing for the second floor, or zone 2, or they can pull up the structural drawing for floor 1 zone 1. The Plan Room viewer is also used in the main e-Builder documents area when viewing files that are part of the Plan Room.
- **Create Meaningful Relationships Between Documents** – Plan Room gives the project document controller all the controls necessary to manage the relationships between files. Document types and attributes leverage the existing e-Builder document management capabilities (e.g. custom fields to set things like trade, floor, zone, etc). Plan Room even keeps the document history, but always shows users the most recent document first.

### 1.16.3 When to Use the Plan Room

The plan room was designed to function on a project by project basis to ensure that you are getting the most out of the investment required to set up and maintain it. To help you make this decision, these are some questions you need to ask to determine if the plan room is a good fit for a particular project.

- **Number of Documents** – Does this project have a large number of project documents and relationships between the documents (i.e. trade, zone, floor, etc.)? The plan room is ideal for large document sets, facilitating an organized and easy-to use document structure where users can easily locate the files they need. One client shared with us they had upwards of 500 documents which would have been otherwise unmanageable without the plan room. For small programs, the standard e-Builder document management folder structures work well.
-

- **Project Size** –Is this a complex project that includes a large scope, multi-story structures, many different trades, specialized zones, floors, etc.? Such projects benefit from the plan room’s ability to group and organize files related by these attributes.
- **Large Number of Casual Document Viewers** – Are there many different “casual” e-Builder users that need to access the documents in this project? Plan room makes it easier and simpler for the “casual” e-Builder user – someone who only uses e-Builder every once in a while – to find the documents they are looking for. Experienced e-Builder users know how to get around and know where to look. The typical casual user is (1) a bidder; or (2) a facility end user – someone who works at the hospital, school etc – and just needs access to a drawing every once in a while. If there is a large casual user base, you’ll be able to justify the administrative overhead that is necessary by way of a document controller, to get everything organized and set up.
- **Extensive Use of the Bidding Module** –Will this project involve the participation of bidders who need to access project documents? Owners using the bidding module will need to easily share plans, specifications, and addenda with a large number of bidders, contractors, sub-contractors and vendors. Each of these potential bidders will need to quickly access the relevant documents in order to prepare their bid response. Often times, these outside parties have little direct e-Builder knowledge and may not be comfortable with the standard e-Builder document management user interface. The plan room viewer may be less cumbersome, more clearly defined and easier to navigate than the e-Builder documents folder structures.

#### 1.16.4 Access Documents Settings

To access Documents settings:

1. Click **Setup**. The e-Builder Setup page displays.
  2. In the **Administration Tools** section, click **Documents**. Links to various Documents settings display.
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### 1.16.5 Plan Room Setup

Plan Room setup is a seven step process that includes the tasks listed below. Plan room setup is required in order to make the plan room operative.

1. [Define Document Custom Fields](#)
2. [Associate Custom Fields with Document Types](#)
3. [Customize Plan Room Settings](#)
4. [Define Project Access](#)
5. [Define Document Relationships](#)
6. [Plan Room Enable Documents](#)
7. [Validate Related Files](#)

#### Related Topics:

- [About the Plan Room](#)
- [About Document Types](#)


### 1.16.6 Define Document Custom Fields

The first step to setting up the plan room is defining the document custom fields for the account. Typically, this step is done by e-Builder Professional Services, but there may be instances where the Account Administrator defines custom fields.

Document custom fields are attributes of a document that help further describe it and its purpose. Examples of document custom fields might include *trade*, *floor*, *zone* etc. With these values defined for each file, it broadens the scope by which users can find the documents they need.

To define document custom fields:

1. Go to Documents Settings. For more information, see [Access Documents Settings](#).
2. Click the **Custom Fields** link. The Document Custom Fields page displays.
3. Click **Add Field**. The Select Data Type page displays.
4. Select **Drop Down List**, and then click **Next**. The Custom Field Details page displays.
5. Enter the custom field name in the space next to **Field Label**.

 **Note:** The custom fields you define must be a drop down list (a finite list)

of predefined values) in order for it to function within the plan room.

6. In the **Drop Down List Options** field, enter the options for the custom field.

**i Tip:** Custom field options are specific attributes of the custom field. For instance, for the custom field Trade, options may be: Architectural, Civil, Electrical, Plumbing, etc. If you are unsure of all the possible values you can always come back to this field later and add the additional values.

7. Click **Next**. The Field Summary page displays.
8. Review the custom field details. If no changes are required, click **Save**.

\*This is procedure 1 of 7 in setting up the plan room. The next procedure is [Associate Custom Fields with Document Types](#).

#### Related Topics:

- [Plan Room Setup](#)

### 1.16.7 About Document Types

As part of the plan room setup, you will establish the document types for the documents in your project. Document types are the first level of access to the plan room. All documents in the plan room are categorized by these document types. During the process of assigning document types, the custom fields created in the [Define Document Custom Fields](#) procedure display, allowing you to associate these values with different document types.


### 1.16.8 Associate Custom Fields with Document Types

In this step you will associate custom field options to each of the document types that will be used in the Plan Room. Document types are the different type of documents that exist throughout the account, such as drawings, specifications or job documents. Adding custom field options to document types assists with related file associations and gives users additional options by which to find the documents they're looking for. For example, if one of your document types is Drawings, then you can add custom fields of Trade, Zone, and Floor to the Drawings document type. By setting it up this way, users will only see those custom fields specific to this document type (i.e. architectural drawings, drawings for zone A, 2nd floor drawings, etc.). This makes it easier for the Project Document Controller to assign the right values to the right documents.

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Before you can associate custom fields to document types, please ensure that document types exist and are enabled for your project. For steps on enabling and adding document types, see [Enable and Add Document Types](#).

1. Go to Documents Settings. For more information, see [Access Documents Settings](#).
2. Click the **Document Types** link. The Document Types page displays.
3. Click the name of the document type you want to add custom fields to. A list of all document custom fields display in the box on the left.
4. Select the custom field(s) you want to add to the document type, and then click **Add**.
5. Use the controls on the right side of the page (**Top, Up, Down, and Bottom**) to order the items as they will display in the custom fields file properties dialog box.

 **Note:** The custom fields file properties dialog box displays during the process of [plan room enabling documents](#).

6. Click **Save**.

\*This is procedure 2 of 7 in setting up the plan room. The next procedure is [Customize Plan Room Settings](#).

Related Topics:

- [Define Document Custom Fields](#)

### 1.16.9 Customize Plan Room Settings

Customizing plan room settings serves multiple purposes. In this procedure, the following tasks are being accomplished:

- Select the folder path where relationship documents will reside. Relationship documents are Microsoft Excel® spreadsheets that define document relationships.
- Define the Jump-To menus that will display in the plan room viewer, which

allows users to “jump” between custom field values (i.e. Trade, Zone, Floor) within the selected document type.

- Define the groups of information and order by which users will navigate to the files they need.
- Enable relationships files so that the relationship document is active.

Below are steps for customizing plan room settings:

1. Go to the documents settings. For more information, see [Access Documents Settings](#).
2. Click the **Plan Room Settings** link. The Plan Room Settings page displays.
3. Click the **Menu Custom Field** drop-down arrow and select the field you want to configure.
4. Click **Lookup** to choose the folder where your relationship documents will reside.
5. Select the **Enabled** check box to make this menu custom field available in the plan room.

**Tip:** Update your document template to include the folder that will house the project relationship documents. This way you will not have to manually add these folders every time a project is created. Set the permissions of this folder to be accessible by the e-Builder Administrators and Document Controller role only.

6. Define the Jump To menus by selecting three document custom fields from the drop-down arrows.

Select up to three custom fields that defines the Jump To:	Define up to three groupings (in order) when viewing the list of Bid:
Document Custom Field: Meeting Type ▾	Document Custom Field: Floor Name ▾
Document Custom Field: Permit Type ▾	Document Custom Field: Received From ▾
Document Custom Field: Report Type ▾	Document Custom Field: Drawing ▾

Tip: These document custom fields will help users navigate to similar documents. For example, if there is a document custom field named Floor and it is selected as an option above, then the user can select floor 1 and navigate from mechanical plans, electrical plans, and structural plans all from floor 1.


7. Define groupings by selecting three document custom fields from the drop-down arrows.

**Note:** The order in which you select the groupings matter. The top grouping will be the first grouping that the users see to navigate further to find the files they are looking for.

Select up to three custom fields that defines the Jump To:	Define up to three groupings (in order) when viewing the list of Bid:
Document Custom Field: Meeting Type ▾	Document Custom Field: Floor Name ▾
Document Custom Field: Permit Type ▾	Document Custom Field: Received From ▾
Document Custom Field: Report Type ▾	Document Custom Field: Drawing ▾

Tip: These document custom fields will help users navigate to similar documents. For example, if there is a document custom field named Floor and it is selected as an option above, then the user can select floor 1 and navigate from mechanical plans, electrical plans, and structural plans all from floor 1.

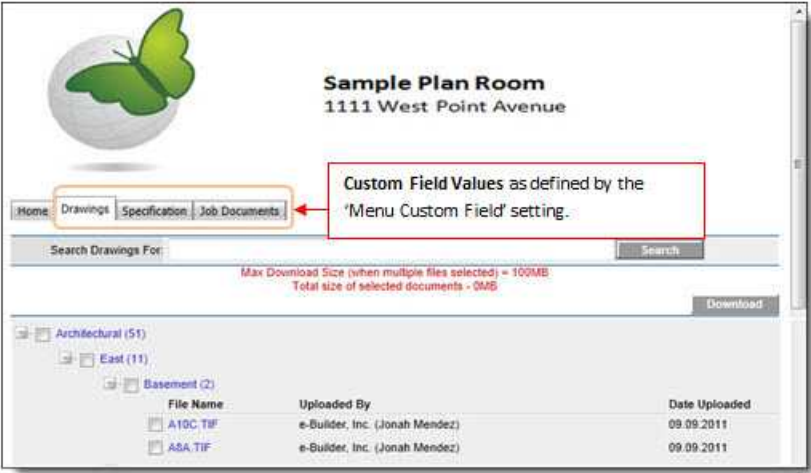
8. In the **Defined Relationships** section, select the Enabled checkbox for each relationship file.


 **Note:** For a detailed description of all the fields located on the Plan Room Setting Page, see [Plan Room Settings Page Overview](#).

\*This is procedure 3 of 7 in setting up the plan room. The next procedure is [Define Project Access](#).


### 1.16.10 Plan Room Settings Page Overview

Document custom fields and document types must be defined before the plan room settings can be configured. This phase of the setup involves defining relationships between documents, so that they display in the appropriate sections of the plan room and facilitate ease of access.


Field	Description
<p><b>Menu Custom Field</b></p>	<p>Click this drop-down arrow to select a custom field to assign. Each custom field renders a different set of tabs, per options defined in the document custom fields.</p>  <p>For more information, see <a href="#">Define Document Custom Fields</a>.</p>
<p><b>Relationship Folder Path</b></p>	<p>Click the <b>Lookup</b> button to select a folder path in the e-Builder Documents Library where relationship documents will be</p>

	<p>stored.</p> <p>Relationship documents provide the mappings that the system reads in order to make the proper file associations. When the plan room loads for a project it will look for the relationship documents in this folder path.</p>
<p><b>Download Relationship Template</b></p>	<p>Click this link to download the relationship template. This Microsoft Excel® template is used to define relationships between documents.</p> <p>Save all relationship files in the designated relationship folder path.</p> <p> <b>Tip:</b> File names have to match the file names in the File Name section of this page for the system to read the document and make file associations.</p>
<p><b>Plan Room Access Default</b></p>	<p>This feature allows you to set a default level of access to the Plan Room for all new projects. If an option other than 'None' is selected, the Plan Room will automatically be enabled on all new projects with the level of access you've selected here.</p> <p>If you choose not to default this setting, administrators will be able to define project access for individual projects at a time. For instructions, see <a href="#">Define Project Access</a>.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> <li>• <b>None</b> - This option restricts user access to the Plan Room.</li> <li>• <b>Internal</b> - This option limits plan room access only to those users who can access e-Builder. If this option is selected, users will only be able to access the plan room through e-Builder; a URL will not be generated.</li> <li>• <b>Public</b> - This option automatically generates a URL from which users can access the plan room. After changes are saved, this URL displays in the External Plan Room URL field located on this page.</li> </ul>

<b>Tabs</b>	These tabs are document custom field options of the custom field selected in the Menu Custom Field drop-down located toward the top of this page. The values for these tabs are defined in the document custom field settings. For more information, see <a href="#">Define Document Custom Fields</a> .
<b>Enabled</b>	Select this checkbox to enable the menu custom field in the plan room. If this checkbox is not selected, the menu custom field will not display in the plan room.
<b>(Jump To) Document Custom Field:</b>	<p>Jump to categories allow you to quickly and easily jump to documents of the same custom field options.</p> <p>Click each <b>Document Custom Field</b> drop-down list in this section to define the three jump to menus that will display in the plan room viewer.</p> <p>For more information, see <a href="#">About the Plan Room - Figure 2</a>.</p>
<b>(Groupings ) Document Custom Field:</b>	<p>Groupings are the hierarchy in which files are sorted when users log in to the plan room. Groupings help users view the listing of files in a meaningful way that can help them get to the file they need to view faster.</p> <p>Click each <b>Document Custom Field</b> drop-down list in this section to define the document groupings.</p>
<b>Define Relationships Section</b>	<p>In this section you are able to define relationships between the document custom field options.</p> <p>These settings affect the Related [Document Type] section located in the left navigation pane of the plan room viewer. For more information, see <a href="#">About the Plan Room - Figure 2</a>.</p>
<b>Enabled</b>	Select these check boxes to make these options visible in the navigation pane of plan room viewer. For more information, see <a href="#">About the Plan Room - Figure 2</a> .

<b>Linked To</b>	These fields auto-populate the custom field options (the tabs located across the middle of the page).
<b>Name in Plan Room</b>	This field auto-populates the word “Related” in front of each custom field option name. These fields pull the related files that display in the navigation pane of the plan room viewer. For more information, see <a href="#">About the Plan Room - Figure 2</a> .
<b>File Name</b>	This field auto-populates the Microsoft Excel file name of the relationship document.   <b>Tip:</b> Your relationship documents should be saved as these file names. File names must match so the system is able to make the appropriate file associations.

### 1.16.11 Define Project Access

 **Note:** There is an account setting that will automatically enable the Plan Room on all new projects, but if this setting is not configured, then administrators will have to enable the Plan Room for their individual projects. For more information on this setting, see [Plan Room Settings Page Overview - Plan Room Access Default](#).

To define project access:

1. Click **Setup**.
2. In the **Administration Tools**, expand the **Projects** link.
3. Click **Mange Projects**. The Project List page displays with a list of all projects.
4. Click the name of the project you want to enable the plan room for.
5. Click **Edit** located in the upper-right side of the page.
6. Click the **Settings** tab.
7. In the **Enable Document Control** field, select the **Yes** radio button.
8. In the **Plan Room Access** field, select an access option from the following:



- **None** - This option restricts user access to the Plan Room.
  - **Internal** - This option limits plan room access only to those users who can access e-Builder. If this option is selected, users will only be able to access the plan room through e-Builder; a URL will not be generated.
  - **Public** - This option automatically generates a URL from which users can access the plan room. After changes are saved, this URL displays in the External Plan Room URL field located on the Project Details page.
  - **Shared Password** - This option allows you to create a shared password for users to enter when accessing the plan room.
    1. Enter a password in the **Shared Password** field.
    2. Re-enter this password in the **Confirm Password** field.
9. Click **Save**.

\*This is procedure 4 of 7 in setting up the plan room. The next procedure is [Define Document Relationships](#).

### 1.16.12 Project Document Controller

The Project Document Controller (PDC) plays a significant role in maintaining the plan room. On an ongoing basis, this role is responsible for keeping documents updated and properly indexed so that plan room users can easily and accurately locate the files they need. The PDC also plays an important role in plan room setup by enabling the project documents to use this feature. Configuring and indexing the relationship between files, creating relationship documents, validating related files and addressing any errors that may occur are also part of the PDC's role.

The topics in this section directly relate to the job function of the Project Document Controller:

- [About Plan Room Enabling Documents](#)
- [Plan Room Enable Documents](#)
- [About Defining Document Relationships](#)
- [Define Document Relationships](#)
- [About Validating Related Files](#)
  - [Validate Related Files](#)
  - [About Exceptions](#)

### 1.16.12.1 About Plan Room Enabling Documents

To access documents in the plan room, they must first be customized in order to be used in the plan room. The Project Document Controller (PDC) performs this task for existing documents after the initial plan room setup. This task is periodically performed by the PDC as documents are added to the Document Library. By plan room enabling documents, you are assigning the document's file type as well as the plan room Jump-To values.

#### Related Topics:


- [About the Plan Room](#)

### 1.16.12.2 Plan Room Enable Documents

#### Best Practice:

You can plan room enable entire folders or individual files. If you cannot ensure that all files in a folder are of the same document type and have the same custom field options, it is recommended that you update files individually, otherwise files will not be properly indexed.

1. Go to the Documents module of the project you want to setup.
2. Select the folder/document you want to customize for viewing in the plan room.
3. Click the **Properties** link. The File Properties dialog box displays.
4. Click the **Custom Fields** tab.
5. Click the **Document Type** drop-down list to assign a document type to the file.
6. In the **Custom Fields** section, click the drop-down list for each custom field and make a selection.

 **Note:** In this step you are defining the "jump to" values that display in the plan room viewer. For more information, see [About the Plan Room](#).

7. Click **Save**.

\*This is procedure 6 of 7 in setting up the plan room. The next procedure is [Validate Related Files](#).

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### 1.16.12.3 About Defining Document Relationships

Typically, the Project Document Controller (PDC) will maintain these relationship files and update them as required when new drawings or addenda are issued, for example. In this procedure, you will create a Microsoft Excel® spreadsheet that has two columns; Document and Related Document. For information on downloading a relationship template, see [Plan Room Settings Page Overview](#).

Specifically, each cell in the spreadsheet is a file. In the example below, document A1-01-a.xls is repeated in the Document column to establish the relationship between this one file and all files that relate to it. If you want users to also see this file when searching for one of the related documents, the reverse relationship must also be established, as illustrated in the last row of the sample below.

Once the relationships have been mapped and the file is saved, you can start uploading the files into the appropriate folders. If there is more than one related file, then the PDC repeats this exercise by adding another row in the spreadsheet. Here's an example of what a relationship file might look like.

Document	Related Document
A1-01-a.xls	A1-01-b.xls
A1-01-a.xls	A2-02.xls
A1-01-a.xls	A2-03.xls
A1-01-a.xls	A3-01.xls
A1-01-a.xls	A4-01.xls

 **Note:** Relationship files must be saved in the designated relationship folder path. For more information about defining the relationship folder path, see [Customize Plan Room Settings](#) or ask your e-Builder Administrator.

Related Topics:

- [Define Document Relationships](#)

### 1.16.12.4 Define Document Relationships

Sample relationship document:


**Primary Document:**

Notice this file is repeated throughout the Document column of the entire relationship document; this is because there are multiple files that relate to this primary document. However, multiple primary documents of the same document type may be added to the same file.

Document	Related Document
A1-01-a. xls	A1-01-b. xls
A1-01-a. xls	A2-02. xls
A1-01-a. xls	A2-03. xls
A1-01-a. xls	A3-01. xls
A1-01-a. xls	A4-01. xls

To define document relationships:

1. Go to the Documents settings. For more information, see [Access Documents Settings](#).
2. Click the **Plan Room Settings** link.
3. Click the **Download Relationship Template** link.
4. In the **Document** column, enter the primary file name and extension.
5. In the **Related Document** column, enter the file name and extension of the related file.
6. Repeat steps 2 – 3 to define additional file relationships.
7. Once all relationships are defined, save the document in the designated relationship folder path you defined in [Customizing Plan Room Settings](#). Name the files in the following name convention: document type\_document type.

 **Note:** Save files as .xls files or Excel 97-2003 Workbook, the Plan Room is not compatible with .xlsx files.

\*This is procedure 5 of 7 in setting up the plan room. The next procedure is [Plan Room Enable Documents](#).

### 1.16.12.5 About Validating Related Files

The Project Document Controller (PDC) can validate document relationships in the folder location that relationship files were uploaded to.

When the PDC clicks on the Plan Room Setup link a popup window displays showing all exceptions on the Exceptions tab. A Related Documents tab is also available, which displays all successful relationships in the file. This window help the PDC validate all of the relationships are defined correctly.


#### Related Topics:

- [Validate Related Files](#)
- [About Exceptions](#)

#### 1.16.12.5.1 Validate Related Files

To validate related files:

1. Click the **Documents** tab located on the Top Navigation Tabs.
2. Click the **Go to Project Documents for...** drop-down arrow and select the project.
3. Click the relationship files destination folder.
4. Click the **Plan Room Setup** link located under the relationship file name you want to validate. The Relationship Files Summary popup window appears.

 **Note:** The Related Documents tab lists all successful relationships in the file. If there are any exceptions, the Exceptions tab is selected and list all exceptions.

\*This is procedure 7 of 7 in setting up the plan room. For more information on setting up the plan room, see [Plan Room Setup](#).

Related Topics:

- [About Validating Related Files](#)

#### 1.16.12.5.2 About Exceptions

Exceptions allow you to see any errors that may have occurred while defining relationships between related files. There are two types of exceptions that can occur:

1. A file is missing
2. There is one or more files with the same name (duplicates)

Related Topics:

- [Define Relationships](#)

## 1.17 Planning

### 1.17.1 Access Planning Settings

e-Builder Administrators can modify planning settings in the e-Builder Administration Tools section located in the Setup.

To access the planning settings:

1. Click **Setup**.
2. In the **Administration Tools** section, expand **Planning**. All planning related settings display.

### 1.17.2 Capital Plans Settings

Capital plans settings provide optional custom field settings that support the need to sort projects by different criteria such as resource, campus, building, project number, or any data that is pertinent to make smart planning decisions. These custom field settings help planners prioritize and determine whether modifications are necessary by looking at a list of projects sorted by these custom fields. It also gives further visibility into the proposed plan and provides a framework for better decision making. Once set, these custom fields are available in capital plans by default. You can also set the default order in which the custom fields display.

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To configure capital plan settings (custom fields):

1. Go to the planning settings. For more information, see [Access Planning Settings](#).
2. Click **Capital Plans Settings**.
3. In the **Configure Columns** section, click each of the drop-down lists and select the custom fields. For information on adding custom fields to the list, see [Managing Custom Fields](#).
4. Choose a sorting preference by selecting either of the Ascending or Descending radio buttons. You can also choose the **Manual Sorting** option.
5. Click **Save**.

### 1.17.3 Escalations

Cost escalation settings allow you to account for the rate of inflation or deflation across all goods and services throughout the life of your project. Annual inflation rates are automatically calculated when costs are added in the planning module. This feature supports accurate calculations and eliminates the threat of human error. Setting escalation rates early on helps you avoid budget overruns, reduces manual efforts and saves time, giving you one less thing to worry about during the planning phase.

The following topics are included in this section:

- [How Escalations Work](#)
- [Set Escalations](#)

#### 1.17.3.1 How Escalations Work


Escalations only apply to scenarios in a capital plan. They are based on the initial start year of the scenario and will not be applied unless the scenario is moved between different years, for instance from 2012 to 2013 (moving a scenario from Dec. 2012 to Jan. 2013 is a qualifying instance, but from Jan. to Feb of the same year is not). Escalation rates are never applied for the initial start year, but for all subsequent years. If scenarios are moved a year or more earlier, the escalation rate will be subtracted by the escalation rate of the year it is moved to, including all years in between. Likewise, if scenarios are moved a year or more in the future, the

escalation rate will be incremented based on the escalation rate starting from the initial start year. Please refer to the diagram below for a visual reference.

**Synopsis:** This diagram illustrates a scenario that has been moved from an initial start year of 2012 to 2015. The escalation rate is set at 2%. The total initial cost of the project is \$1,000,000.00. With the 2% escalation rate, the resulting project cost is 1,061,208.00.

	2012	2013	2014	2015	2016	2017	2018
Escalation Rate:	2%	2%	2%	2%	2%	2%	2%
Initial start year - 2012	1,000,000.00						
Resulting start year - 2015				1,061,208.00			

### 1.17.3.2 Set Escalations

 **Note:** If the planner chooses to add escalation rates to the capital plan, their settings will override what is set here.

To set escalations:

1. Go to the planning settings. For more information, see [Access Planning Settings](#).
2. Click **Escalations**.
3. Enter the percent of inflation for each year of your project.
4. To add additional years to the list, click **Add**.
5. Click **Save**.

### 1.17.4 Scenario Templates

Scenario templates are best used if there are standard elements that apply to all or a majority of your planned/potential projects such as design, construction, permit costs, and furniture, fixtures and equipment (FF&E). Using scenario templates is also a great way to establish a standard, initial budget for every project or certain types of projects i.e. vertical vs. horizontal construction or water/sewage vs. parks & recreation.

The procedure below describes creating the scenario template, adding categories,



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category assumptions as well as activating the template. Scenario templates can be activated at any time. Before activation, templates are in draft mode and not available for use or public viewing. Once activated, planners can see and use templates when creating scenarios.

To create scenario templates:

1. Go to the planning settings. For more information, see Access Planning Settings.
2. Click **Scenario Templates**. The Scenario Templates page displays.
3. Click **Add**. The Add Scenario Template dialog displays.
4. Enter the name of the template in the **Name** field.
5. Click the **Category** icon to add categories to the template. The category dialog displays.
6. Click **Save**.
7. Repeat steps 5-6 for all the categories you want to add.
8. Click the line beneath the category to add category assumptions.
9. Enter the estimated cost for the item in the **Estimate** column.
10. Click the **Activate** icon. You are prompted for confirmation.
11. Click **OK**.

## 1.17.5 Create Project and Scenario Views


### 1.17.5.1 Create Project Views


At least one project view is required when adding capital plans. A view lets the planners pick active projects to add into a plan. For information on creating project views, see Add Views.

### 1.17.5.2 Create Scenario Views

At least one scenario view is required for adding project scenarios. The best way to utilize views when adding scenarios to a plan is to build it such that it automatically prioritizes the scenarios for you. For example, you might want to set a view where the scenarios are listed in order of a ranking score or based on a priority of high, medium, or low.

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 **Tip:** Make sure to set the sorting of a priority or ranking type field so that the scenarios are listed in the right order of priority.

 **Tip:** In order to set scenarios to be listed in order of importance from high, medium, to low you need to [set a project custom field](#) called something like 'priority' and create values like '1 – High', '2 – Med', '3 – Low'. Make sure to number them as such so they list correctly; otherwise they list in alphabetical order and it would list in order of 'High', 'Low', and 'Med'.

To create scenario views:

1. Click **Setup**.
2. Expand **Views**.
3. Click **Planning**.
4. Click **Add View**. The Add View page displays.
5. Enter the name of the view in the **Name** field.
6. In the **Columns Displayed (numbered left to right)** section, enter the name of the columns that will display in the view.
7. Click **Save**.

### 1.17.6 Units of Measure

When creating project scenarios, category assumptions can be entered using a number of metrics that include lump sum (LS), unitized cost (UC), square feet (SQ) and formula (F). In order to enter items as unitized costs, the units of measure in the cost module must first be defined. This setting affects the Cost and Planning modules. If these settings are not already defined, follow the steps below to define Cost Units of Measure.

1. Click **Setup**.
  2. In the **Administration Tools** section, click **Cost**.
  3. Click **Units of Measure**. If these settings are already defined, a list of available units of measure (UOM) displays. Otherwise, continue to step four to define the UOM.
-

4. Click **Use Defaults** to use a default list.

Or

Enter each individual UOM abbreviation and description per line.

5. Click **Save**.

## 1.18 Processes

The Processes module helps to automate business processes according to a set of business rules. A core capability of the e-Builder system is its ability to facilitate collaboration. Effective collaboration and communication amongst the project teams is an essential ingredient for success on each construction project. The e-Builder Processes module facilitates collaboration by providing a mechanism to route information based on defined business rules, track communications and ensure accountability for all parties along the process work path.

Processes will empower an organization to store, retrieve, change and use the business rules that affect its operations in a simulated and repeatable environment. Processes that are consistent and standardized within an organization that would normally require human knowledge to carry out can now be taken care of by the system. In other words, the system allows all project team members to access and update a process with little to no knowledge of the entire process because it is automated.

### 1.18.1 Manage Processes

The Manage Processes option allows you to manage existing processes and create new ones. There are four distinct tabs from which you can manage processes:

- [Properties Tab](#) –Configure process details.
- [Data Tab](#) –Integrate cost data for cost and non-cost processes, create data fields and data field dependencies to capture all necessary information from the user base.
- [Page Layout Tab](#) – Determine the look and feel of each layout per user group. Restrict or expose data based on user roles.
- [Workflow Tab](#) – Design the steps and actions of the process.

Collectively, working from each tab allows you to configure a process by defining the details, data, and the look and feel of the entire process from start to finish.

## 1.18.2 Access Process Settings

To access process settings:

1. Click **Setup**.
2. In the **Administration Tools** section, click the **Processes** link. All Process related setting options display.

## 1.18.3 About Cost Processes

Cost-related processes are those related to the following:

- Budget Change
- Commitment Change
- Commitment
- Commitment Invoice
- General Invoice
- Retainage amounts
- Allowances

The biggest convenience of integrated cost process is that cost items automatically update in the appropriate area in the Cost Module, requiring no further data input within e-Builder. For instance, a potential change order (PCO) can include a link to the commitment change cost item in order to facilitate a change to a contract or purchase order (PO). When the PCO is approved, the commitment change is automatically approved in the Cost module as well. As the PCO is being routed for approval the commitment change has a status of pending. While this is occurring, the appropriate project cost summary columns are automatically updated and reflected in your key reports. As the initiator of a cost process, you must ensure that cost item data fields are completed before submitting the process step.

### **Allowances**

Commitment items can be flagged as allowance items by selecting the Allowance check box at the item level. If there are contractual stipulations that no invoices are to be applied against these allowance amounts until approved, e-Builder knows not to invoice directly against these amounts until there is an approval.

The behavior of entering or updating cost items in a process is the same as in the Cost module. For more information, refer to the following sections for details on e-Builder's Cost-related functions:

- Budget Changes
  - Commitments
-

- Commitment Changes
- Actual Cost
  - Commitment Invoice
  - General Invoice
- Allowances
- Retainage

Depending on your process settings, you may or may not be able to do the following:

- Update the reason code for commitment changes and budget changes
- Select whether the invoice is a commitment invoice or general invoice
- Change the commitment type
- Pick the type of unit costs that applies to the commitment

Related Topics:

- [Set up Cost Processes](#)
- [Data Tab Overview](#)


## 1.18.4 Properties Tab



From the Properties tab you can enter all the details of the process including any custom fields if any exist for the project and overall instructions that apply to the entire process. The following topics are included in this section:

- [Properties Tab Overview](#)
- [Create New Processes](#)
- [Edit Existing Processes](#)
- [Activate a Process](#)

### 1.18.4.1 Properties Tab Overview




The properties tab is the first page to display when [adding a new process](#). It's also the first to display after selecting an existing process. You can simply view process details or click Edit to make changes to any of the fields below. From the Properties tab you can enter all the details of the process including any custom fields if any exist for the project and overall instructions that apply to the entire process. The following are detailed descriptions of the fields located on the Properties tab.

Field	Description
<b>Delete Process</b>	<p>Click to delete the process, including process instances; or to delete process instances only.</p> <p> <b>Warning:</b> Deleted processes cannot be recovered.</p> <p>This button displays only for account administrators, project administrators and users with 'manage workflow' permissions.</p> <p>The following are dependencies that will prevent a process from being deleted:</p> <ul style="list-style-type: none"> <li>• The process is used in a data field process lookup.</li> <li>• The process is used in a custom report type</li> <li>• The process is used in a dynamic cost column</li> </ul> <p>For detailed steps on deleting a process, see <a href="#">Delete Processes/Instances</a>.</p>
<b>Copy Process (View Mode)</b>	<p>Click this button to create a duplicate of the process. The copied process will include every object in the process such as layouts, data fields, and published workflows only; saved and auto saved workflows will not copy over. By default, the copied process will be inactive. You must edit project properties to make it active. For more information, see <a href="#">Activate a Process</a>.</p>
<b>Edit (View Mode)</b>	<p>Click this button to modify process properties.</p>
<b>Process Name</b>	<p>Enter the name of the process in this field.</p>
<b>Process Prefix</b>	<p>Enter a short or abbreviated name/acronym of the process (e.g. PCO for Potential Change Order). The same prefix cannot be use more than once. The prefix shows in various areas of the product such as the Project Processes page. Once a process has been started by a user the prefix can no longer be edited.</p>

<b>Description</b>	Enter notes or a description of the process. The description is shown on the Start Process page to give users direction on which process they need to start.
<b>Active</b>	<p>When a process type is first created it is set to not active. When set to active all users that have permission are able to fill one out.</p> <p> <b>Note:</b> Leave the process type inactive when configuring the process to prevent any users from accessing a process type that is not completely configured.</p>
<b>e-Builder Mobile Enabled</b>	<p>Select this check box to make this process available on any e-Builder mobile device.</p> <p> <b>Note:</b> Cost processes are not currently available on mobile devices. If you intend to make this a cost process, do not select this check box, otherwise, the cost options will not display on the Data tab.</p>
<b>Enable the Ability to Delegate Work</b>	Select this check box to allow the actor(s) in the step the ability to delegate work. This applies to all steps in the process.
<b>Instructions</b>	<p>Enter generic process instructions that apply to the entire process. Remember, you are also able to add step-specific instructions for each step in the process. You can type directly into this box or paste text from a word processing application. Pasting tables is also permitted.</p> <p>From the user's perspective, these instructions show up in the top right corner of the process as a help button in the form of a question mark. When selected, instructions display in a pop up window.</p>
<b>Allow comments to be deleted</b>	This setting determines whether or not comments are allowed to be deleted by either the commentor or an administrator (account admin, project admin, or users with

	<p>'Manage Workflow' permissions). Users will be able to see that there had been a comment, but it was "Deleted." If necessary, deleted comments can be overridden by an administrator (account admin, project admin, or users with 'Manage Workflow' permissions).</p> <ul style="list-style-type: none"> <li>• <b>No (Account Default):</b> By default this setting is disabled. Leave this radio button selected to keep this setting disabled.</li> <li>• <b>Yes:</b> Select this radio button to enable this setting.</li> </ul>
<p><b>Project(s) using this process</b></p>	<ul style="list-style-type: none"> <li>• <b>All projects:</b> Select this option to assign this process to all projects.</li> <li>• <b>All Projects except the following blocked projects:</b> Select this option to create a blocked list of projects to exclude this process from.</li> <li>• <b>Only the following selected projects:</b> Select this option to create a list of projects to assign this project to.</li> <li>• <b>Projects filtered by one or more custom fields:</b> Select this option to assign this process to projects filtered by one or more custom fields. For example, a project could have a custom field called region and a sample project could have a value 'east'. A process can be configured so that it is only available in those projects where the region is equal to 'east'.</li> </ul>
<p><b>Allow external uses to view attached forms and processes when external comment is requested</b></p>	<ul style="list-style-type: none"> <li>• <b>Yes</b> - Select to allow external participants to view forms and processes that have been attached to this process when external comments are requested. This would only allow them to view attached forms and processes up to one tier.</li> <li>• <b>No</b> - Select to prevent external participants from viewing forms and processes attached to this process when a comment is requested by them.</li> </ul>




<p><b>Who can start this process?</b></p>	<p>Set permissions on who can start the process; possible values are all users, selected roles or no users.</p> <p> <b>Note:</b> One use case for not allowing anyone to start this process is if it will be <a href="#">spawned</a> from another process.</p>
<p><b>Who can view drafts of this process</b></p>	<p> <b>Note:</b> If this process spawns another, this setting will be set to 'No Users' by default, as a draft can not be created of a spawned process. To learn more, see <a href="#">About Spawned Processes</a>.</p> <p>Draft processes are created for many different reasons. At times, team members do not remember to use a draft process and create a new one or co-workers – who are unable to see the draft processes of others – do not know the draft exists and submits a new process for the same item. Draft process will be accessible from the Unfinished Drafts page.</p> <p> <b>Note:</b> Any person or role given the ability view draft processes will automatically be given the ability to start the process, if they do not already have this permission.</p> <p>Set permissions on who can view drafts of this process from the following options:</p> <ul style="list-style-type: none"> <li>• <b>All users selected for start process</b> - Select to give view draft rights to all users that have the ability to start the process.</li> <li>• <b>Selected roles</b> - Select to restrict the viewing of drafts to select roles.</li> <li>• <b>No users</b> - Select to prevent everyone from viewing draft processes.</li> </ul>
<p><b>Who can view all process instances?</b></p>	<p>Set permissions on who can view the instances of this process .</p> <ul style="list-style-type: none"> <li>• <b>All users</b> - This is the default option. Select to give all project participants the ability to view instances of this process.</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Selected roles</b> - Select to restrict viewing of process instances to select roles.</li> <li>• <b>No users</b> - Select to prevent anyone from viewing process instances.</li> </ul>
<b>Who can report on this process</b>	<p>Set permissions on who can report on this process.</p> <ul style="list-style-type: none"> <li>• <b>All users</b> - This is the default option. Select to give all users the ability to report on this process.</li> <li>• <b>Selected roles</b> - Select to allow only certain roles to report on this process.</li> <li>• <b>No users</b> - Select to prevent any user from reporting on this process.</li> </ul>
<b>Who is notified as the process moves between steps?</b>	<p>Make a choice to set automatic email notifications as the process moves between steps; possible values are all users, selected roles and no users. By default the value is set to no users. Note: Be careful when setting this control to a set of users. The amount of emails received can be abundant.</p>
<b>Who can view/add private comments for this process?</b>	<p>These are controls that allow you to set who can see the comments. If the comments are marked private, only those users selected to be able to see the comments may see them. If the comments are marked public, all users may see them.</p>
<b>Set Comments to 'Private' by default</b>	<p>This check box becomes active when a role is selected in the previous field (Who can view/add private comments for this process?). Select this check box to automatically set comments to private by default, giving users the choice to clear this check box and make comments public.</p>
<b>Lookup Fields</b>	<p>Lookup fields are standard options that allow you to pull data from the Cost module. These fields show up on the dependent process tab after the dependent process has</p>


	been linked to a primary process as an audit trail and for quick viewing access. For more information on lookup fields, see <a href="#">About Lookup Processes</a> .
<b>Process Lookup Tab Name</b>	Enter a name for the process lookup tab in this field. If this process has dependent processes linked to it, this name (the primary process name) will display when users hover over the dependent process tab on the process details page.
<b>Default Sort</b>	Selections in this field are directly related to options that have been selected in the Lookup Fields section above it. Click this drop-down arrow to select a field that these options will be sorted by default.
<b>Attached Documents Default Folder Path</b>	Click <b>Browse</b> to set a default folder path for documents attached to this process type. This feature will apply to all projects. Select the <b>Allows users to place the file in a different folder</b> check box to allow team members to make a different folder selection at the time of upload. Click <b>Clear</b> to remove the folder path.

#### 1.18.4.2 Create New Processes

 **Note:** If you want to create a cost process, see [Set up Cost Processes](#).

To create a new process:

1. Go to the Process settings. For more information, see [Access Process Settings](#).
2. Click **Manage Processes**.
3. Click **Create New Process**. The Create New Process – Properties tab displays.
4. Enter all required fields.


 **Note:** See [Properties Tab Overview](#) for a detailed description of each field.

5. Click **Save**.

To add additional information to your processes, follow the procedures below:


- [Add Data Fields](#)
- [Add Page Layouts](#)
- [Create the Workflow](#)

#### 1.18.4.3 Edit Existing Processes

 **Note:** If a process has been created and is not being used, you can [delete the process](#) or repurpose it by renaming and modifying it to suit your needs. To tell whether or not a process is being used, Go to the [Workflow Properties page](#) and click the Where Used button.

To edit an existing process:

1. Go to the process settings. For more information, see [Access Process Settings](#).
2. Click **Manage Processes**.
3. Click the title of the process you to edit.
4. Click **Edit**.
5. Modify all desired fields.

 **Note:** See [Properties Tab Overview](#) for a detailed description of each field.

6. Click **Save**.

Related Topics:

- [Set up Cost Processes](#)
- [Delete Processes/Instances](#)

#### 1.18.4.4 Activate a Process

Process activation is not an available option while creating a new process. Processes should not be activated until they have been completely configured. When the process is complete active it to make it available to participants.

To activate a process:

---

1. Go to the process settings. For more information, see [Access Process Settings](#).
2. Click **Manage Processes**.
3. Click the title of the process you to activate.
4. Click **Edit**.
5. Select the **Active** checkbox.

Setup > Manage Processes > Budget Change Process > Edit Process

**Budget Change Process**

Properties | Data | Page Layouts | Workflows

**Properties**

Process Name:	Budget Change Process
Process Prefix:	BC
Description:	Propose a budget change for approval.

Active:

6. Click **Save**.

#### 1.18.4.5 Delete Processes/Instances


Account administrators can delete a process, and all of their associated instances from their account. Details of the deletion can be recovered by running an audit log report on the Processes module.

**Warning:** Once deleted, processes cannot be recovered.

**Note:** Account administrators, project administrators and users with 'manage workflow' permissions are able to delete process instances, without deleting the process by choosing the 'Allow comments to be deleted' check box in the process properties. For more information, see [Properties Tab Overview](#).

To delete a process:


1. Go to Process settings. For more information, see [Access Process Settings](#).
2. Click **Manage Processes**.
3. Click the title of the process you to delete.
4. Click **Delete Process**. You are prompted for confirmation.

 **Note:** If there are dependencies that prevent you from deleting the process, a message that list all dependencies display and you will have to correct these issues before the process can be deleted.

5. Enter a note.
6. Enter your password to confirm deletion.
7. Click **Yes, Delete**.

### 1.18.5 Data Tab

After a process has been created the Data tab is available, allowing you to add or edit data fields that are needed for a process. From the Data tab you also configure cost integration for cost processes. Cost integration will automatically update cost items as steps in the process are updated. From here you are also able to add data fields, which are used to capture all necessary information throughout the structured workflow.

 **Note:** For information on Data Field eSignature Settings, see [Configure eSignature Data Field Settings](#).

The following topics are included in this section:


- [Access Data Tab](#)
  - [Data Tab Overview](#)
  - [About Module Integration](#)
  - [Set up Cost Processes](#)
  - [Add Process Data Fields](#)
  - [Edit Process Data Fields](#)
  - [Add Process Data Field Dependencies](#)
  - [Reorder Data Fields](#)
  - [About Lookup Processes](#)
  - [Set up Lookup Processes](#)
-

### 1.18.5.1 Access Data Tab

To access the Data Tab:

1. Go to Process settings. For more information, see [Access Process Settings](#).
2. Click **Manage Processes**.
3. Click the title of the process you want to modify.
4. Click the **Data** tab.

### 1.18.5.2 Data Tab Overview

Field	Description
Save	Click this button to save changes.
<b>Module Integration</b>	
If you selected a cost entity from the 'Include Cost Item' drop-down arrow, this section will include settings for the respective cost item.	
 <b>Note:</b> Assigning a layout is optional. A default layout is available if one is not assigned. For cost integrated processes that have a layout assigned to the start step, the layout must include module integration.	
Include Cost Item	This drop-down arrow is used to select a cost entity to integrate into a cost process. If you are not creating a cost process, select None. Otherwise choose from available cost entity options. A description of item is as follows:
Settings that are applicable to all cost items	<p><b>Cost Item Permissions:</b></p> <p>Use this section to set permissions for users that are able to access and use this process.</p> <p><b>All</b> – Select this radio button to allow all users on the project to see cost data located in the process instances that they have access to.</p> <p><b>Administrator Only</b> – Select this radio button to allow only the project administrator see cost data located in process instances.</p>

	<p><b>Selected Roles</b> – Select this radio button to choose specific project users that can see cost data for the process instances that they have access to.</p> <p><b>Restrict External Commenters from viewing Cost Item</b> – If you request comments from an external user, a public page opens for these users that look exactly like the process instance; selecting this check box will restrict them from seeing any cost data.</p> <p><b>Numbering:</b></p> <p><b>User entry based on cost auto-fill setting*</b> – Select this radio button to allow budget change numbers to be automatically populated by the system, yet editable by the user.</p> <p><b>Created based on Process Prefix and Counter (e.g. COR-0010)</b> – If auto-filling is enabled in the <a href="#">Cost Control Settings</a>, selecting this radio button will allow e-Builder to automatically populate commitment invoice numbers. This option will automatically start the number with the process prefix, followed by a number that will be incremented with each added budget change. Although auto-filled, this numbering field is still editable.</p> <p>If auto-fill is not enabled in <a href="#">Cost Control Settings</a>, this field will be blank when a new process is started.</p>
<b>Budget Change</b>	<p>You have the ability to set any of the following reason code settings:</p> <ul style="list-style-type: none"> <li>• Not let the user change it – choose a reason code from the drop-down arrow and clear the check box.</li> <li>• Set the reason code and let the user change it – choose a reason code and select the check box</li> <li>• Allow the user to make the selection – Leave default settings. (Choose 'None' and select the check box)</li> </ul>



	<p>Related Topic: <a href="#">Working with Change Reason Codes.</a></p>
<b>Commitment</b>	<p>You have the ability to set any of the following commitment type settings:</p> <ul style="list-style-type: none"> <li>• Not let the user change it – choose a commitment type from the drop-down arrow and clear the check box.</li> <li>• Set the commitment type and let the user change it – choose a commitment type and select the check box</li> <li>• Allow the user to make the selection – Leave default settings. (Choose ‘None’ and select the check box)</li> </ul> <p>Related Topic: <a href="#">Working with Commitment Types.</a></p>
<b>Commitment Change</b>	<p><b>Restrict Commitments for Company/Contacts</b> Click this drop-down arrow to set a restriction so that only the company or contact associated with a commitment is able to view the commitment change.</p> <ul style="list-style-type: none"> <li>• Do Not Restrict – This is the default selection. Leave this setting if you do not want to specify a restriction, which will allow the change to be viewable by anyone associated with the commitment.</li> <li>• Restrict to Companies – Select to allow the commitment change to be viewable by the company associated with the commitment, which also includes all contacts within the company.</li> <li>• Restrict to Contacts – Select to allow the commitment change to be viewable only by the contact associated with the commitment.</li> </ul> <p><b>Hide Current Budget when Adding New Items</b> Select this check box to restrict the current budget from being shown when adding new scope line items. When filling out a commitment change process, when the user selects a budget</p>

	<p>line item for the new scope items, the current budget will not be shown.</p> <p><b>Reason Code Settings:</b> You have the ability to set any of the following reason code settings:</p> <ul style="list-style-type: none"> <li>• Not let the user change it – Choose a reason code from the drop-down arrow and clear the check box.</li> <li>• Set the reason code and let the user change it – Choose a reason code and select the check box</li> <li>• Allow the user to make the selection – Leave default settings. (Choose 'None' and select the check box)</li> </ul> <p>Related Topic: <a href="#">Working with Change Reason Codes.</a></p>
<b>Actual Cost</b>	<p><b>Restrict Commitments for Contacts</b> Select this check box to keep contacts from seeing commitments.</p> <p><b>Reason Code Settings:</b> You have the ability to set the invoice type to any of the following:</p> <ul style="list-style-type: none"> <li>• User Choice (Let the user make the selection)</li> <li>• Commitment invoice</li> <li>• General invoice</li> </ul>
<b>Dynamic Commitment Line Items</b>	<p>Select this option to create a dynamic commitment process.</p> <p>This option displays only if the Dynamic Cost Management functionality is enabled on your account.</p>
<b>Dynamic Budget Line Items</b>	<p>Select this option to create a dynamic budget process.</p> <p>This option displays only if the Dynamic Cost Management functionality is enabled on your account.</p>
<b>Data Fields</b>	

<p>Data fields comprise of information you want to supply to users as well as space holders for the information you want users to submit throughout the steps of the process. You will have the opportunity to add these data fields to the different page layouts of the process. Each page layout is customized for each specific user type. See <a href="#">Page Layouts Tab</a> for more information.</p>	
<b>Reorder</b>	<p>Click this button to reorder data fields. You may choose to reorder data fields to determine how they will display to end users. Also, if a page layout was not configured on a step then by default all data fields are listed in the order set here. For details on the different attributes of a data field and how to add a data field, see <a href="#">Add Process Data Fields</a>.</p>
<b>Add Field</b>	<p>Click this button to add data fields. Data fields are used for information gathering. For example, an RFI process could contain fields such as RFI Reason, Information Requested and Answer. Later, you can configure page layouts to determine which actors can see which data fields. If a <a href="#">page layout</a> is not configured on a step then by default all data fields are listed in the order that you set here. Different data field types behave differently. A three step wizard is provided to create your data field of choice. For instructions, see <a href="#">Add Process Data Fields</a>.</p>
<b>Field Dependencies</b>	<p>Field dependencies allow you to link custom fields to each other. This helps prevent data entry errors, and speeds up the manual effort required to fill in your custom fields as you build out new projects.</p>

### 1.18.5.3 About Module Integration

To create a cost process, which integrates cost items, such as budget changes, commitment changes, commitments, commitment invoices or general invoices, e-Builder's module integration can establish that connection between a cost item and a process.

**Module Integration**

Include Cost Item: None

**Data Fields**

Label	Variable Name
	None
	Budget Change
	Commitment
	Commitment Change
	Actual Cost

There are no data fields

For example, a potential change order (PCO) can link a commitment change cost item to facilitate a change to a contract or purchase order (PO). The power of integrating a cost item to an appropriate process is that the cost item or object will automatically update the appropriate area in the Cost module requiring no further data input. When the PCO is approved, the commitment change is automatically approved in cost. As it is being routed for approval, the commitment change has a status of Pending. While this is occurring, the appropriate project cost summary columns are automatically updated and reflected in your key reports.

**Note:** If you choose to assign a layout for a cost process, then the Start step must be assigned a layout that has the module integration data field configured in it.

**Note:** Stipulations regarding cost processes: The table below lists a few important conditions that vary based on the type of cost process you are configuring:

Type of Cost Process	Condition
<b>All cost processes</b>	Assigning a layout is optional. A default layout is available if one is not assigned. For cost integrated processes that have a layout assigned to the start step, the layout must include module integration.
<b>Actual costs</b>	You have the ability to set the invoice type to any of the following: <ul style="list-style-type: none"> <li>• Commitment invoice</li> <li>• General invoice</li> <li>• Let the user make the selection</li> </ul>
<b>Budget changes, Commitments</b>	You have the ability to set any of the following reason code settings: <ul style="list-style-type: none"> <li>• Not let the user change it</li> </ul>

	<ul style="list-style-type: none"><li>• Set the reason code and let the user change it</li><li>• Leave it set to None to allow the user to make the selection</li></ul>
<b>Commitment Type</b>	Applies to cost item commitment

#### 1.18.5.4 Set up Cost Processes

To set up a cost process:

1. Click the Data tab. For more information, see [Access Data Tab](#).
2. Click **Edit**.
3. Click the **Include Cost Item** drop-down arrow to select the appropriate cost item.
4. Enter all required and appropriate fields. For a detailed description of the fields and buttons on this page, see [Data Tab Overview](#).
5. Click **Save**.

To add additional information to your cost process, follow the procedures below:

- [Add Page Layouts](#)
- [Create the Workflow](#)

#### 1.18.5.5 Add Process Data Fields

Data fields are used for information gathering. For example, an RFI process could contain fields such as RFI Reason, Information Requested and Answer. Later, you can [configure page layouts](#) to determine which actors can see which data fields. If a page layout is not configured on a step then by default all data fields are listed in the order that you set here. Different data field types behave differently. A three step wizard is provided to create your data field of choice.

**Tip:** If you just need cost data, you don't have to add any data fields as these items will automatically be pulled in from the Cost module when you [set up the cost process](#).

To add data fields:

1. Go to the Data tab. For more information, see [Access Data Tab](#).
2. Click **Add Field**.
3. Select the data type.

Select Data Type	Description
<input checked="" type="radio"/> String	Enter up to a maximum number of characters
<input type="radio"/> Text Block	Enter up to a maximum number of characters on multiple line
<input type="radio"/> Integer	Enter a whole number
<input type="radio"/> Decimal	Enter a number with a specified number of digits to the right of the decimal point
<input type="radio"/> Drop-down List	Select one value from a list of values
<input type="radio"/> Multi-pick List	Select any number of values from a list of values
<input type="radio"/> Radio button List	Select one value from a list of values
<input type="radio"/> Checkbox List	Select any number of values from a list of values
<input type="radio"/> Date	Enter a date
<input type="radio"/> Account User	Select one user from the list of all users on the account
<input type="radio"/> User In Role	Select one user from the list of users in the selected Role
<input type="radio"/> User In Role On Project	Select one user from the list of users in the selected Role that are members of the current project
<input type="radio"/> User On Project	Select one user from the list of users that are members of the current project
<input type="radio"/> Company	Select a company from a list of companies on the account
<input type="radio"/> Company On Project	Select a company from the list of companies that are associated with the current project
<input type="radio"/> File	Browse to and select file for attachment
<input type="radio"/> Process Lookup	Lookup for a process on the account to make dependent on this process
<input type="radio"/> Project	Select a project from the list of projects available to the logged in user

4. Enter field attributes which include:
  - Field label (the variable name will populate based on the data entered in this field)
  - A description if needed.
  - Default value if any. If there is a default value entered, the field automatically populates with this data.
  - Field permissions - limits the users that are able to enter data in this field.
  - Field value options.
  - Text to show above data field which will display over the field name in the process.
5. Click **Next**. The field summary page displays a preview of the field just created.
6. Click **Save** or **Save & Add** to create another data field.

#### Related Topics:

- [Add Process Data Field Dependencies](#)
- [Set up Lookup Processes](#)


### 1.18.5.6 Edit Process Data Fields

To edit process data fields:

1. Go to the Data tab. For more information, see [Access Data Tab](#).
2. Click the **Edit** link located left of the data field you want to edit.
3. Modify all necessary fields, and then click **Next**.
4. Click **Save**.

### 1.18.5.7 Add Process Data Field Dependencies

Process data field dependencies allow you to link custom fields to each other. This helps prevent data entry errors, and speeds up the manual effort required to fill in your custom fields as you build out new projects.

 **Note:** Below is a list of data types that can be used as controlling and dependent fields in a process data field dependency. Data types that aren't listed here cannot be added to a process data field dependency:

#### Qualifying Controlling Fields:

- Radio Button Lists
- Drop-Down Lists

#### Qualifying Dependent Fields:

- Radio Button Lists
- Check Box Lists
- Drop-Down Lists
- Multi-Pick Lists

To add process data field dependencies:

1. Go to the Data tab. For more information, see [Access Data Tab](#).
2. Click **Field Dependencies**.
3. Click **Add Dependency**.
4. Click the **Select a Controlling field** drop-down arrow to select a controlling field.
5. Click the **Select a Dependent field** drop-down arrow to select a dependent

field.

6. Click **Next**.
7. Select values for controlling and dependent fields.
8. Click **Save**.

#### 1.18.5.8 Reorder Data Fields

You may choose to reorder data fields to determine how they will display to end users. Also, if a page layout was not configured on a step then by default all data fields are listed in the order set here. For details on the different attributes of a data field and how to add a data field, see [Add Data Fields](#).

As you build out your custom fields you may want to associate or link these data fields to each other to prevent data entry errors and speed up the effort in filling out the information. For more information, see [Add Data Field Dependencies](#).

Related Topics:

- [Add Page Layouts](#)

#### 1.18.5.9 About Lookup Processes

In many cases e-Builder workflow processes are connected and flow from one to another through the project life cycle. An example of this is a potential commitment item that becomes a request for information. Or perhaps a request for information later becomes a change order request, which is ultimately rolled into a change order along with other potential change orders. Creating lookup processes is very helpful, for instance to generate reports that show how workflow process instances are linked together. It may also be important for you to know if a change order is tied to a potential change order, and if that potential change order is linked to one or more RFIs. so that it is clear what led to the change order.

A third example of lookup processes in action would be if an RFI led to a potential change order, and if that potential change order was rolled into a change order, being able to see at a glance the 'big picture' of the linkage among the processes, you can easily see the current disposition of the RFI within the big picture.

In e-builder, you link one process to another by using a [data field](#) of the type 'Lookup Process'. The process will have been defined with a field titled 'Lookup Process'. For such processes, a link will be displayed titled Lookup which allows you to select a non-draft instance of the linked process defined for the data field. This Lookup popup offers filters to facilitate searching on the instances.

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For every primary process there is a list of all its dependent process data-field combinations, along with functionality so that you can directly add a new dependent process or attach an existing dependent process.

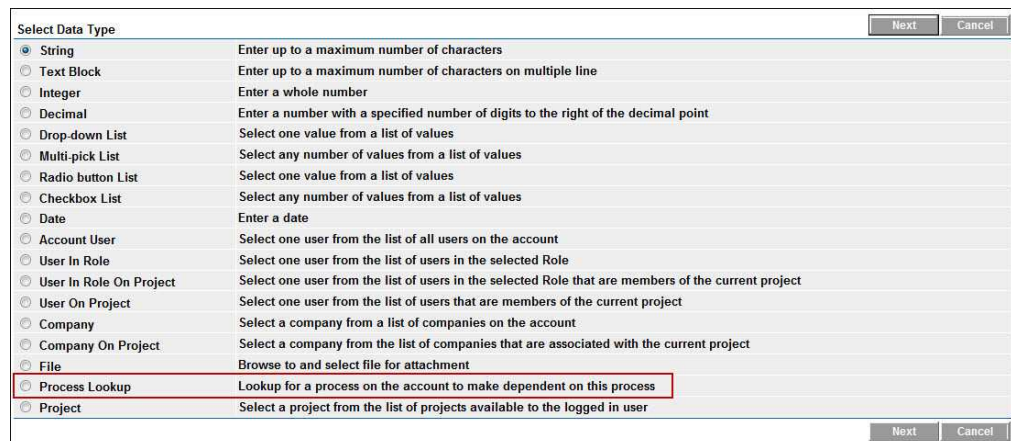
For detailed steps on setting up lookup processes, see [Set up Lookup Processes](#).

#### 1.18.5.10 Set up Lookup Processes

When setting up a lookup process, the process that will be your dependent process must already be created so that you're able to choose this process from the Processes drop-down arrow. For information on creating a process, see [Create New Processes](#).

To set up a lookup process:

1. Go to the Data tab for the process that will be your primary process. For more information, see [Access Data Tab](#).
2. Click **Add Field**.
3. Select **Process Lookup**.



Select Data Type	Description
<input checked="" type="radio"/> String	Enter up to a maximum number of characters
<input type="radio"/> Text Block	Enter up to a maximum number of characters on multiple line
<input type="radio"/> Integer	Enter a whole number
<input type="radio"/> Decimal	Enter a number with a specified number of digits to the right of the decimal point
<input type="radio"/> Drop-down List	Select one value from a list of values
<input type="radio"/> Multi-pick List	Select any number of values from a list of values
<input type="radio"/> Radio button List	Select one value from a list of values
<input type="radio"/> Checkbox List	Select any number of values from a list of values
<input type="radio"/> Date	Enter a date
<input type="radio"/> Account User	Select one user from the list of all users on the account
<input type="radio"/> User In Role	Select one user from the list of users in the selected Role
<input type="radio"/> User In Role On Project	Select one user from the list of users in the selected Role that are members of the current project
<input type="radio"/> User On Project	Select one user from the list of users that are members of the current project
<input type="radio"/> Company	Select a company from a list of companies on the account
<input type="radio"/> Company On Project	Select a company from the list of companies that are associated with the current project
<input type="radio"/> File	Browse to and select file for attachment
<input checked="" type="radio"/> Process Lookup	Lookup for a process on the account to make dependent on this process
<input type="radio"/> Project	Select a project from the list of projects available to the logged in user

4. Click **Next**.

Setup > Manage Processes > Budget Change Process > Add/Edit Data Field

Budget Change Process - Add Data Field Step 2 of 3

Data Field Details Previous Next Cancel

Field Label:

Variable Name:

Description:

Field Permissions:

- All
- Administrator Only
- Selected Roles

All Roles

- Activity Manager
- Admin
- Architect/Engineer
- Copy Editor
- Cost/Budgeting
- General Contractor

Add >> << Remove

Selected Roles

Do not allow duplicates:

Processes: Please select...

Allow only unattached dependent processes to be attached:

Font Name Size B I U A Previous Next Cancel

Text To Show Above Data Field:

5. Enter field attributes which include:

- Field label (the variable name will populate based on the data entered in this field).
- A description if needed.
- Field permissions – enter the users that are able to enter data in this field.
- Do not allow duplicates – select this check box to restrict duplicate custom field values for the same process within this project.
- **Processes** – click this drop-down arrow to select a dependent process.
- Allow only unattached dependent processes to be attached – select this check box if you wish to only allow dependent processes to be used for one Primary process; dependent processes will not be shareable among Primary processes.
- Text to show above data field which will display over the field name in the process.

6. Click **Next**. A field summary page displays a preview of the field just created.

7. Click **Save** or **Save & Add** if you would like to create another data field.

**Related Topics:**

- [About Lookup Processes](#)

## 1.18.6 Page Layouts Tab

Use the Page Layouts tab to organize data fields into custom displays. Page layouts let you create views for different user types. This helps you determine which users can see particular information. Each of these layouts can be assigned to the workflow as a whole or to a specific step. Why would you want to assign different layouts? For a step in a process there is typically a set of activities that need to occur for that step to complete, such as reviewing certain data fields that have already been filled out by another user and filling others out. To make it very clear, you should show only those fields that are needed to complete that step. There are two types of layouts:

- **Actor Layout:** This layout will display the fields that the person taking action on the step should see.
- **Non Actor Layout:** This layout displays what every user with the permission to be a part of the workflow can see. Censor proprietary data by excluding it from this layout.

The page layouts page lists all page layouts configured. From here you are also able to tell if they are in use (assigned to one or more steps), tell if the layout is an actor or non-actor layout, and determine when the layout was last modified.

The following topics are included in this section:

- [Access Page Layouts Tab](#)
- [Layout Properties Page Overview](#)
- [Add Page Layouts](#)
- [Create Sections](#)

### 1.18.6.1 Access Page Layouts Tab

To access the Page Layout Tab:

1. Go to process settings. For more information, see [Access Process Settings](#).
2. Click **Manage Processes**.
3. Click the title of the process you want to modify the page layout for.

4. Click the **Page Layouts** tab.

### 1.18.6.2 Layout Properties Page Overview

The Layout Properties page displays after saving a new layout or opening an existing layout for editing. For instructions on accessing the Page Layouts tab, see Access Page Layouts Tab. You may also be interested in instructions for Adding Page Layouts. Below is an overview of the Layout Properties page.

**Note:** The order that data fields are in is how they will display in the workflow.

Setup > Manage Processes > Document Review and Approval > Page Layouts > View Layout > Edit Layout

#### Edit Layout

Properties | **Data** | Page Layouts | Workflows

Layout Properties Preview Save Save & Add Layout Cancel

Layout Name: Actor Layout

Default Process Non-Actor Layout:

Default Process Actor Layout:

Manage Sections Note: Fields will be dropped in the order in which they are selected Edit Field Properties Create Section

Data	Edit	Delete
Attach Insurance Details		
Dependent Process		
Document Phase		
Estimated Duration in Days		
Module		

**Legend**

Used in Page Layout	Not in Page Layout
<input checked="" type="checkbox"/> Required Field	<input checked="" type="checkbox"/> Read Only Field
<input checked="" type="checkbox"/> Controlling Field	<input checked="" type="checkbox"/> Dependent Field
Selected	


**Data Fields**


Attach Insurance Details	Contract Estimate in Dollars
Dependent Process	Detailed Scope of Estimate
Document Phase	Estimated Date of Completion
Estimated Duration in Days	Lookup Process Test
Module	Select AE
Trades in Scope	Version Number

Preview Save Save & Add Layout Cancel

**Note:** The screen shot above shows the page layout tab in Edit mode. Different options display in View mode as described in the table below.


Field/Button	Description
<b>Where Used</b>	This button displays when the page layout is in view mode. Click this button to view in which workflows this page layout is being used.

<b>Preview</b>	Click this button to see an end user view of the page layout.
<b>Edit</b>	This button displays when the page layout is in view mode. Click this button to modify the page layout.
<b>Delete</b>	This button displays when the page layout is in view mode. Click this button to delete the page layout.
<b>Save</b>	Click this button to save the layout.
<b>Save &amp; Add Layout</b>	Click this button to save the layout and <a href="#">add another page layout</a> .
<b>Copy</b>	<p>This button displays when a page layout is in view mode.</p> <p> <b>Tip:</b> Copying page layouts is a quick way to create new layouts with slight modifications as oppose to creating an entirely new layout from scratch.</p>
<b>Cancel</b>	Click this button to cancel any changes since last saved.
<b>Layout Name</b>	Enter the name of Name of the page layout in this field.
<b>Default Process Non-Actor Layout</b>	Setting that if checked will set this layout to be the default non-actor layout. If no non-actor layout is assigned to a workflow or step it will automatically inherit this layout.
<b>Default Process Actor Layout</b>	Select this check box to make this layout the default actor layout. If no actor layout is assigned to a workflow or step it will automatically inherit this layout.

<b>Manage Sections</b>	This area is designed to manage sections and data fields. With drag and drop capabilities, data fields can be dropped in sections and sections can be moved up and down. You can also modify the data fields and section properties.
<b>Edit Field Properties</b>	Click this button to display the properties of a selected data field.
<b>Create Section</b>	Click this button to create a new section. A section must be created before data fields can be added.
<b>Legend</b>	The Legend indicates the type of field each data field is.
<b>Data (drop-down arrow)</b>	<p>This grid contains all the data fields available to drag and drop into a section. These are all the fields created in the process of <a href="#">adding data fields</a>. The drop-down arrow allows you to select between Data Fields and Module Integration. If you are working on a cost process, it is listed as an option for you to add as a field in the layout.</p> <p>Click one or more of the data fields and drag them over to the Data area.</p> <p> <b>Note:</b> the order in which you place data fields in this section is how they display in the workflow.</p> <p>Once data fields are in the data section, right-click selected fields or click the <b>Edit Field Properties</b> button to make fields Read-Only or Required.</p>
<b>Section</b>	Each section created is visible in the Manage Sections grid. Click on the edit or delete links to edit or delete the section. You can edit each data field listed in the section by right clicking the mouse; choices are edit field properties or remove field.


### 1.18.6.3 Add Page Layouts

Page layouts allow you to customize the data fields that display for each actor or non-actor in the process. For instance, you may want cost data field to visible to the management team, but not the architect. Page layouts let you decide which data fields are available for each actor in the process.

 **Note:** Data fields will display in the order that they are saved.

To add page layouts:

1. Go to the Page Layouts tab. For more information, see [Access Page Layouts Tab](#).
2. Click **Add Layout**. The Layout Properties page displays.
3. Enter the name of the layout in the **Layout Name** field.
4. Select whether this is a default non-actor or default actor layout by clicking the **Default Process Non-Actor Layout** or **Default Process Actor Layout** check box.

 **Note:** Page layouts can be assigned to steps and workflows and not just processes. If a layout is set to be the default for a process that means that every step will inherit that default layout if no layout is assigned to the workflow or step(s). This allows you to quickly set up a process without requiring you to save a layout to each step (or workflow). If there is no default layout assigned to a process the system checks the workflow layout default setting. If a default is set for the workflow layout, the step layout is used.

5. Click **Save**. The Edit Layout page displays.
6. Select the data fields on the right side of the page and drag into the Data section.

Setup > Manage Processes > Document Review and Approval > Page Layouts > View Layout > Edit Layout

### Edit Layout

Properties | Data | Page Layouts | Workflows

Preview Save Save & Add Layout Cancel

#### Layout Properties

Layout Name: Actor Layout

Default Process Non-Actor Layout:

Default Process Actor Layout:

#### Manage Sections

Note: Fields will be dropped in the order in which they are selected

Edit Field Properties Create Section

Data	Edit	Delete
Attach Insurance Details		
Dependent Process		
Document Phase		
Estimated Duration in Days		
Module		

#### Legend

Used in Page Layout	Not in Page Layout
Required Field	Read Only Field
Controlling Field	Dependent Field
Selected	

#### Data Fields

Attach Insurance Details	Contract Estimate in Dollars
Dependent Process	Detailed Scope of Estimate
Document Phase	Estimated Date of Completion
Estimated Duration in Days	Lookup Process Test
Module	Select AE
Trades in Scope	Version Number

Preview Save Save & Add Layout Cancel

7. To make a field required or read only, select the field and then right-click on the field and select **Edit Field Properties**. The Section Field Properties dialog box displays.
8. Select the required or read-only check box, and then click **Save**. You are returned to the Layout Properties page.
9. Click **Save**.

Related Topics:

- [Page Layout Tab](#)
- [Create Sections](#)

#### 1.18.6.4 Create Sections

Page Layout sections can be created while [adding a page layout](#) or you may add sections later on. The procedure below details the latter.

For more information on the fields and buttons located on this page, see [Layout Properties Page Overview](#).

To create sections after the page layout has already been saved:

1. Go to the Page Layout tab. For more information, see [Access the Page Layout](#)



### [Tab.](#)

2. Click the title of the page layout you want to create sections for. The Layout Properties page displays.
3. Click **Edit**.
4. Click **Create Sections**. The Add Section dialog box displays.
5. Enter the name of the section in the **Name** field.
6. Click the **# of Columns** drop-down arrow to select the number of columns you'd like.
7. Click the **Tab Order** drop-down arrow to select the order of the tabs.
8. Click the **Show Header** checkbox to show the header, otherwise, leave this checkbox empty.
9. Click **Save**. The Layout Properties page displays.
10. Select, drag and drop the desired data fields or module integration components to the section.
11. To make a field required or read only, select the field and then right-click on the field and select **Edit Field Properties**. The Section Field Properties dialog box displays.
12. Select the required or read-only check box, and then click **Save**. You are returned to the Layout Properties page.
13. Click **Save**.

### 1.18.7 Workflow Tab

The Main Workflow screen lists all the created workflows. Each workflow can be assigned to one or more projects. You can filter on project assignments and add a new workflow. When a workflow is published, e-Builder automatically names the workflow the name of the process with a date and time stamp; however, you can assign it a different name, if you desire. A workflow can only be published when all business rules have been met, meaning if for example if all the routable steps are arranged so that all possible flows reach the 'finish' step. If there are any errors during a publish attempt e-Builder will let you know by displaying warning messages.

From the Workflows tab you are able to design or edit your structured workflow

process, and if you have a saved or auto-saved copy, you can open it from here and continue working on it. If your workflow is already published and in use, the Where Used button allows you to see every instance where this workflow is being used. From this tab you are also able to add escalation rules. Escalation rules are automated reminders for users to complete a past due task.

The following topics are included in this section:

- [Access Workflows Tab](#)
- [Workflow Properties Page Overview](#)
- [Creating the Workflow](#) (A Multiphase Process)
- [Workflow Overview Pages](#)

#### 1.18.7.1 Access Workflows Tab

To access the workflows tab:

1. Go to Process settings. For more information, see [Access Process Settings](#).
2. Click **Manage Processes**.
3. Click the title of the process you want to modify.
4. Click the **Workflows** tab. All existing workflows, if any, display on this page.

#### 1.18.7.2 Access Workflow Designer

From the workflow designer you are able to create the workflow process by adding and configuring the process steps.

To access the workflow designer:

1. Go to the Workflows tab. For more information, see [Access Workflows Tab](#).
  2. Click the title of the workflow you want to access.
  3. Click **Design Workflow**. If multiple versions of the workflow exist, you are prompted to make a choice, and then click **Load**. The Workflow Designer displays.
-

### 1.18.7.3 Access Step Properties

The steps of a process are configured in the Workflow Designers. The properties of a step allow you to choose the actors, apply layouts, determine the behavior of the step and many other actions.

To access the properties of a steps:

1. Go to the Workflows tab. For more information, see [Access Workflows Tab](#).
2. Click the title of the workflow you want to access.
3. Click **Design Workflow**. The Choose Workflow Versions dialog box displays.
4. Click the workflow you want to modify then click **Load**. The Workflow Designer displays.
5. Right-click the step you want to view properties for, and then click **Properties**. The Edit Step Dialog Box displays.

#### Related Topics:

- [Workflow Designer Icons Overview](#)

### 1.18.7.4 About Spawned Processes

Spawn Process steps allows a process to spawn another process when the workflow enters that step. A classic example of this would be a potential change order (PCO) that can spawn a change order request (COR) if approved by the appropriate parties. When the parent process spawns another process the workflow stays in the spawn step until the child (or spawned) process completes the start step. Then the parent process will complete its spawn step and move along its path in the workflow. The child (or spawned) process will automatically attempt to complete the start step without requiring human intervention.

The spawn process step has only one action called 'Spawn Complete' and cannot be altered. This action completes automatically when the child process successfully leaves the start step (as mentioned above). If the child (or spawned) process cannot complete the start step then a comment will be added to the parent process describing the error. E-Builder Administrators and those actors in the spawn process step will be able to complete the start step of the child process.

How does the child process (or spawned process) automatically complete the start step? Simple. You map the required fields from the parent process to the child process to allow the system to complete the start step for you. Remember that in order for a step to complete, all defined required fields must be filled out (in data entry steps). And, the start step is a data entry step.

For detailed instructions on spawning a process, see [Spawn Processes](#).

## Spawned Steps and Lookup Processes

If your spawned step involves a process that includes a Lookup Process, when you select the lookup process from the 'Spawn Process' drop-down arrow, the [Spawn Edit Step page](#) displays additional options.

The screenshot shows the 'Edit Step' configuration interface. At the top, there are 'Like' and 'Dislike' buttons. Below that, the 'Edit Step' title is followed by 'Properties' and 'Escalation Rules' tabs. The 'Step Properties' section includes fields for 'Name' (Quote as Sub), 'Send Comment Notifications To Actors' (checked), 'Description', and 'Spawn Process' (Change Order). There are 'Save' and 'Cancel' buttons. Below this, there are options for 'Copy Attached Files', 'Layout', and 'Preview'. The 'Actors' section lists 'Available Roles' (ACM, Administrative Assistant, CAR Rep, Change Control, Construction Manager, Contractor) and 'Selected Roles'. There are 'Add >>' and '<< Remove' buttons. At the bottom, there are 'Background Color' and 'Text Color' pickers. A red box highlights the 'Lookup Data Fields' section, which has tabs for 'Required Fields (0)', 'Optional Fields (0)', 'Other Fields (12)', and 'Lookup Fields (2)'. The table below shows the mapping:

Change Order Data Fields	Budget changes not allowing reason code changes Data Fields
Change Proposals	Select a data field...
WRT 123	Select a data field...

For additional information on Lookup Processes see [Setup Lookup Processes](#).

### 1.18.7.5 About External Workflow Processes

e-Builder's External Workflow Participation functionality may or may not be available on your account. If it is determined there is a need for this feature during the implementation, it will be enabled. The external workflow participation allows external users to receive process steps in the form of documents and act upon those

documents via e-mail. Their information is sent and received via e-mail and automatically routed into the system without their having to log into e-Builder. This feature provides tremendous flexibility when working on large projects that include many participants and actors, all of whom may be a part of the project. It allows that information to be e-mailed and sent back automatically without the need for human intervention. This saves valuable time, allows you to better manage large projects, and lowers project costs.

External workflow processes cannot be created for processes that include the following:

- Cost process configuration
- 'Company' data field
- 'Company on Project' data field
- 'Process Lookup' data field
- 'Project' data field

## Configuring External Workflow Processes

The external workflow feature is configured in the same way as any other workflow. When designing the workflow, [within the step](#) that will include external participants, click the 'External Participation' check box and choose whether this person will be an actor or non-actor. Through external workflow participation, external users can optionally initiate a process if you so choose. To enable external process initiation, simply click the 'Allow Workflow to be Started via Email' check box located on the [Workflow Properties page](#) in Edit mode. This is all it takes for the administrator to configure the workflow for external participation. For an understanding of the user's perspective, see [Starting an External Workflow Process](#).

In short, to configure an external workflow process, ensure that the following minimum settings are configured, and then go on to [creating the workflow](#) as usual.

- On the Workflow Properties page, select the **Allow Workflow to be Started via Email** check box
- On the Edit Step Properties page, select one of the **External Participation** check boxes.

Related Topics:

- Starting an External Workflow Process

#### 1.18.7.6 Creating the Workflow

A workflow illustrates each step of the process. The Workflow Designer helps you create the process and add details to each step such as the actions that will allow the process to move to each subsequent step, the actors in each step, notifying parties if any, and you are also able to assign layouts to each step during the process of creating the workflow.

Creating a workflow is a multiphase process. Each phase of the process can be saved and edited later on, or you may choose to add the workflow and perform all the workflow design steps all at once. For the purpose of this user assistance guide, the phases of this process are presented as separate tasks. Each procedure picks up where the previous one left off.

The following are the tasks included in creating a workflow:

1. [Add New Workflows](#)
2. [Design Workflows](#)
3. [Edit Steps](#)
4. [Add Actions](#)
5. [Add Data Field Assignments](#)
6. [Add Escalation Rules](#)
7. [Connect Steps in the Workflow](#)
8. [Spawn Processes](#)
9. [Complete Workflows](#)

##### 1.18.7.6.1 Add New Workflows

To add a new workflow:

1. Go to the Workflow Tab. For more information, see [Access Workflow Tab](#).
2. Click **Add Workflow**. The Workflow Properties page displays.
3. Complete all required fields. For detailed information on each field, see [Add New/Edit Workflow Page Overview](#).
4. Click **Save**.

\* This is procedure 1 of 9 in creating a workflow. The next procedure in this process


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is [Design Workflows](#).

#### 1.18.7.6.2 Design Workflows

To design workflows:

1. Go to the Workflow Designer. For more information, see [Access Workflow Designer](#).
2. Right-click on the Start circle and click Properties. The Edit Step page displays.
3. Complete all required fields.
4. Click **Save**.


 **Tip:** Multiple versions of a workflow design can be saved. Be sure the workflow you want to use is the account default. To do so, click the Account Default check box on the [Add New/Edit Workflow page](#).

\* This is procedure 2 of 9 in creating a workflow. The next procedure in this process is [Edit Steps](#).

#### 1.18.7.6.3 Edit Steps

To edit steps in the workflow:

1. Go to the step properties of the step you want to modify. For more information, see [Access Step Properties](#).
2. Complete all required fields.

 **Note:** The step cannot be saved until an action is added. See [Add Actions](#).

3. Click **Save**.

\* This is procedure 3 of 9 in creating a workflow. The next procedure in this process is [Add Actions](#).


#### Related Topics:

- [Edit Step Page Overview](#)
- [About External Workflow Processes](#)

#### 1.18.7.6.4 Add Actions

To add actions to a step:

1. Go to the step properties of the step you want to modify. For more information, see [Access Step Properties](#)
2. Click **Add Action**. The Add Action dialog box displays.
3. Complete all required fields. For a detailed description on each field, see [Add Action Page Overview](#).

 **Note:** You can create as many actions as needed to complete the routing of the process.

4. Click **Save**.

\* This is procedure 4 of 9 in creating a workflow. The next procedure in this process is [Add Data Field Assignments](#).

#### 1.18.7.6.5 Add Data Field Assignments

Data field assignments are a mechanism for auto-populating Admin-defined data taken from project details and exposing them into the process. To learn more about data field assignments, see [Add Assignment Page Overview](#).

To add a data field assignment:

1. Go to the step properties of the step you want to add data fields to. For more information, see [Access Step Properties](#).
  2. Click **Add Action**. The Add Action dialog box displays.
  3. At the bottom of the Add Action dialog box, click **Assignments**. The [Add Assignment](#) dialog box displays.
  4. Click the **Assign to Field** drop-down arrow and select the process data field to assign the expression to.
  5. Click the **Select Field** drop-down arrow to select the project details data field, you want to pull data from.
-



6. Click **Insert** to add this relationship to the **Assignment Expression** box. If this concludes your data field assignment, continue to step 7.
7. If you are creating a data field assignment that is part of a formula, click an operator, and then repeat steps 2 and 3.
8. Optionally, you can also use a function as the entire assignment expression or part of the expression using any of the steps above.
9. Click **Save**.

\* This is procedure 5 of 9 in creating a workflow. The next procedure in this process is [Add Escalation Rules](#).

#### 1.18.7.6.6 Add Escalation Rules

Escalation rules can be set for specific steps in a process or for an entire process. This is an optional setting. If set for a specific step then the escalation will only occur if the step meets the defined escalation requirement. Adding escalation rules allow you to automate email reminders to users when a process step or an entire process has not been completed within a certain amount of time or based on conditions that you determine.

To add escalation rules:

1. To add escalation rules to the entire workflow, go to the process' Workflows tab. For instructions, [see Access Workflows Tab](#).

Or

To add escalation rules to a process step, go to the step properties and click the **Escalation Rules** tab. For instructions, see [Access Step Properties](#).

2. Click **Add Rule**. The Add Escalation Rule dialog box displays.
3. Complete all necessary fields. For a description of the fields on this page, see [Add Escalation Rule Page Overview](#).
4. Click **Save**.

\* This is procedure 6 of 9 in creating a workflow. The next procedure in this process

is [Connect Steps in the Workflow](#).

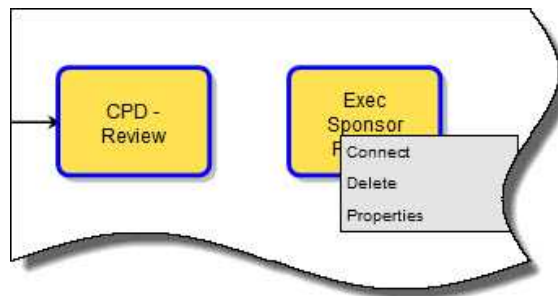
### Related Topics:


- [Add Escalation Rule Page Overview](#)
- [Workflow Designer Icons Page Overview](#)
- [Edit Step Dialog Box](#)

#### 1.18.7.6.7 Connect Steps in the Workflow

To connect the steps in your workflow:

1. Go to the Workflow Designer. For more information, see [Access Workflow Designer](#).
2. Click on the originating step. A blue outline appears around the step.
3. Click on the subsequent step. A blue outline appears around this step as well.
4. Right-click the subsequent step. A context menu displays.



 **Note:** Alternately, you can drag a connector onto the workflow area, right-click on it, and click Properties.

5. Click **Connect**. The Add Connector dialog box displays. The **From Step** and **To Step** fields are filled in based on your selection of the steps. The first step selected, displays in the From Step field.
-

Give Us Your Feedback on this Page

**Add Connector**

**Connector Properties**

From Step:	CPD - Review
Action:	Content Sent for Copy Editing
To Step:	Exec Sponsor Review
Connector Text:	Copy Editing
Type:	<input type="radio"/> Straight <input checked="" type="radio"/> Elbow
From Step Connection Point:	Auto
To Step Connection Point:	Auto

6. Complete all required fields. For a detailed description of each field, see [Add/Edit Connector Page Overview](#).

7. Click **Save**.

\* This is procedure 7 of 9 in creating a workflow. The next procedure in this process is [Spawn Processes](#).

#### 1.18.7.6.8 Spawn Processes

To spawn a process means to allow a process to start another process when the workflow enters that step. When the parent process spawns another process the workflow stays in the spawn step until the child (or spawned) process completes the start step.

**Note:** The process that will be spawned from this process must be created before configuring this step.

To spawn a process:

1. Go to the Workflow Designer. For more information, see [Access Workflow Designer](#).
2. Click and drag the spawn shape into the workflow area. The [Edit Step dialog box](#) for the spawn step displays.
3. Enter all required information. For a detailed description of each field, see [Spawn Edit Step Page Overview](#).
4. Click **Save**.

5. Follow the [Connect Steps in the Workflow](#) procedure to connect the Step and the Spawn process.

\* This is procedure 8 of 9 in creating a workflow. The next procedure in this process is [Complete Workflows](#).

#### Related Topics:

- [About Spawn Processes](#)


#### 1.18.7.6.9 Complete Workflows

To complete the workflow:

1. Go to the Workflow Designer. For more information, see [Access Workflow Designer](#).
  2. Click **Error Check**. If there are errors, e-Builder will list them on the upper left-hand side of the page. If not, the message 'Workflow is valid' appears.
  3. Click **Save**, and then click **Publish**.
  4. Close the Workflow Designer. The Workflow Properties screen displays.
  5. Click **Edit**.
  6. Select the starting and finished process layout if none was selected in the workflow step.
  7. Select a default actor and non actor layout.
  8. If the process has a due date, select the check box and enter the number of days for completion.
  9. Select the Subject Read Only check box if the subject should be defaulted to a specific string and enter in the default.
  10. Select the "has tracking prefix" check box if you wish to have an additional field to track specific data in the numbering of the process.
  11. If the workflow is for the entire account and not specific projects make sure the account default box is checked. If this workflow is for a set of projects you can uncheck this check box and select the projects in the Project
-

Assignments.

12. Click **Save**.
13. If applicable, create escalation rules. See [Add Escalation Rules](#) for more information.

 **Note:** You can have multiple workflows defined for a process.

\* This is procedure 9 of 9 in creating a workflow. For more information on creating a workflow, see [Creating the Workflow](#).

### 1.18.7.7 Workflow Overview Pages


This section includes an overview of the dialog boxes and pages that display within the sections of the Workflow tab:

- [Add New/Edit Workflow Page Overview](#)
- [Workflow Designer Icons Overview](#)
- [Edit Step Page Overview](#)
- [Add Action Page Overview](#)
- [Add Assignment Page Overview](#)
- [Add Escalation Rule Page Overview](#)
- [Edit Conditional Branch Page Overview](#)
- [Add/Edit Connector Page Overview](#)
- [Spawn Edit Step Page Overview](#)
- [Edit Automation Step Page Overview](#)

#### 1.18.7.7.1 Workflow Properties Page Overview

The Workflow Properties page appears when you click the title of an existing workflow, located on the Workflow tab. For more information on accessing the Workflows tab, see [Access Workflows Tab](#). The Workflow Properties page has a number of controls, allowing you to view and edit workflow details; view where the workflow is being used; design and copy the workflow; and add escalation rules. A brief description of the actions available on this page is located in the table below. Field descriptions that are active in edit mode are also provided.

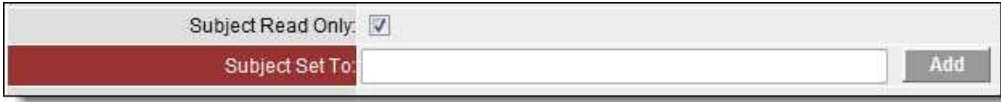

Field	Description
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<b>d/B utt ons</b>	
<b>View Mode:</b>	
<b>Wh ere Use d</b>	This button allows you to view where the workflow is being used in your site. The Workflow Instances page displays with a list of workflow instances that meet your filter criteria. You are also able to filter workflow instances by status, step name and containing text to find instances more easily.
<b>Desi gn Wor kflo w</b>	Click this button to start designing the structured workflow, or continue working on a saved workflow. For instructions on designing a workflow, see <a href="#">Design Workflows</a> . For an overview of the icons on this page, see <a href="#">Workflow Designer Icons Overview</a> .
<b>Cop y Wor kflo w</b>	Click this button to copy the workflow and use it as a starting point for creating another workflow. The Copy Workflow page displays, similar to the Add New Workflow page, allowing you to change workflow details if necessary.   <b>Tip:</b> Copying an existing workflow is a time-saving way to start a new workflow with similar properties.
<b>Edit</b>	Click this button to edit the workflow details.
<b>Can cel</b>	Click this button to return to the Workflows page.
<b>Add Rul e</b>	Click this button to open the Add Escalation Rule dialog box and add escalation rules to the workflow. Escalation rules are automated reminders for users to complete a past due task. When defined at the workflow level, the escalation rule will be automatically inherited by every step in the workflow. You can also set rules at the step level so that it only applies to the step. These rules allow you to set up automatic escalations based on certain conditions, such as a step ages after a certain amount of time past the process start date. When setting a step escalation rule at the workflow level,

	for every step that meets that condition, the escalation notification will fire off. The notification is emailed to the specified group of users. Additionally, you can add additional conditional statements to the rule. See <a href="#">Add Escalation Rules</a> for detailed instructions.
<b>Edit Mode:</b>	
Click the Edit button to enter Edit mode	
<b>Workflow Name</b>	Enter the name of workflow.
<b>Instructions</b>	Enter instructional text that applies to the entire workflow. When designing workflows you can add step-specific instructions if you choose. The instructions added here display as a help link in the upper-right corner of the process.
<b>Starting Process Layout</b>	Click this drop-down arrow to select the starting process layout that will be used for the start or fill out step of the process.  For information on creating page layouts, see <a href="#">Add Page Layouts</a> .
<b>Finish Process Layout</b>	Click this drop-down arrow to select the layout that will be used when the process has closed or finished.  For information on creating page layouts, see <a href="#">Add Page Layouts</a> .
<b>Default Act</b>	This layout will automatically be used for every step in the workflow when no actor layout has been assigned in the step properties.

<b>or Lay out</b>	
<b>Def ault Non -Act or Lay out</b>	This layout will automatically be used for every step in the workflow when no non-actor layout has been assigned in the step properties.
<b>Has Due Dat e</b>	Select this check box to assign a due date to the entire workflow. Once selected, the <b>Days for Completion</b> field automatically displays. Enter the number days required to complete the entire workflow in this field.
<b>Day s for com plet ion</b>	This field displays when the <b>Has Due Date</b> checkbox is selected. Enter the number days required to complete the entire workflow in this field.
<b>Allo w Due Dat e Mo dific atio n</b>	Select this checkbox to grant end users the ability to modify the automatically calculated due date.
<b>Subj ect</b>	Select this check box to set the subject to read-only. Note that if the Subject is set to read-only it will be hidden. This is helpful in standardizing workflow



<b>Read Only</b>	<p>names for record-keeping purposes.</p> <p>This setting also allows you to link field values listed in a drop-down window to control the subject description value.</p> <p>The <b>Subject Set To</b> field appears when this check box is selected.</p>  <p>Click <b>Add</b> to open the Edit Expression window and make selections as to what the subject value will be.</p> <p>Click Select Field and select values with operators. This dialog box functions identical to the <a href="#">Add Assignments</a> page.</p> <p>When external workflows are designed, e-Builder honors the subject read-only and tracking prefix settings when the document is generated. If the workflow is copied, the Subject field settings persist.</p>
<b>Subject Set To</b>	<p>This field displays when the Subject Read Only checkbox is selected. Use this field to create a standard subject, giving users one less field to complete.</p>
<b>Has Tracking Prefix</b>	<p>For tracking purposes, select this check box to indicate that an assigned code already exists.</p>
<b>Account Default</b>	<p>This field only displays in edit mode. Select this check box to make this workflow the default option for all projects if a project isn't selected in the <b>Project Assignments</b> section or for just the assigned projects.</p> <p> <b>Note:</b> A default account workflow is automatically created when a process is created. If you did not modify the workflow, the system-generated account default is used, which simply has a start and finish step.</p>

<p>All o w W o r kfl o w to be St art ed via E m ail</p>	<p>This field may or may not be visible to you. The external workflow participation feature is turned on during implementation if it is determined that there is a need for this functionality. Enabling external workflow participation allows an external user to participate in the process, and/or initiate the process via email.</p> <p>If this option is available for your account, select this check box to allow the workflow to be started via email. You are prompted to select a destination folder where attached files will be placed. You also have the option to enter additional instructions for external users or include default instructions.</p> <p>For more information on external workflow participation, see <a href="#">About External Workflow Processes</a>.</p>
<p>Hi de Ac tio n Bu tto n</p>	<p>Select this check box to hide the "Take Action" button in the user interface. If this check box is selected, the action will be submitted by just changing the selection in the action drop-down list.</p> <p> <b>Note:</b> This button can be given any name you choose. For more information, see <a href="#">Add Action Page Overview</a>.</p>
<p>All o w Co m m en ts/ At ta ch m en ts Af</p>	<p>Select this check box to allow users to continue to add comments and attachments to processes that have reached the finish step. If this check box is not selected, users will not be able to add comments or attachments after the process is complete.</p>

<b>ter Fin ish St ep</b>	
<b>Pr oj ec t As sig n m en ts</b>	Select the projects that will use this workflow. If no projects are selected, the workflow will be available to all projects. Keep in mind that multiple workflows may exist, but only the account default workflow will be available to assigned projects. The account default settings can also be configured on this page.

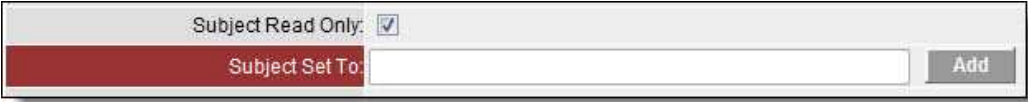
#### 1.18.7.7.2 Add New/Edit Workflow Page Overview


The Add New/Edit Workflow page allows you to set up the preliminary details of the workflow or make changes to the details of an existing one. Below are detailed descriptions of the fields located on the Add New/Edit Workflow page. To access this page, go to the [Workflows Tab](#), click the title of the workflow, and then click Edit.

<b>Fi el d</b>	<b>Description</b>
<b>W or kfl o w Na m e</b>	Enter the name of workflow.
<b>Ins</b>	Enter instructional text that applies to the entire workflow. When designing

<b>tru cti on s</b>	workflows you can add step-specific instructions if you choose. The instructions added here display as a help link in the upper-right corner of the process.
<b>St art in g Pr oc es s La yo ut</b>	Click this drop-down arrow to select the starting process layout that will be used for the start or fill out step of the process.  For information on creating page layouts, see <a href="#">Add Page Layouts</a> .
<b>Fin ish Pr oc es s La yo ut</b>	Click this drop-down arrow to select the layout that will be used when the process has closed or finished.  For information on creating page layouts, see <a href="#">Add Page Layouts</a> .
<b>De fa ult Ac tor La yo ut</b>	This layout will automatically be used for every step in the workflow when no actor layout has been assigned in the step properties.

Default Non-Actor Layout	This layout will automatically be used for every step in the workflow when no non-actor layout has been assigned in the step properties.
Has Due Date	Select this check box to assign a due date to the entire workflow. Once selected, the <b>Days for Completion</b> field automatically displays. Enter the number days required to complete the entire workflow in this field.
Days for completion	This field displays when the <b>Has Due Date</b> checkbox is selected. Enter the number days required to complete the entire workflow in this field.
Allow Due Date Modification	Select this checkbox to grant end users the ability to modify the automatically calculated due date.

ification	
Subject Read Only	<p>Select this check box to set the subject to read-only. Note that if the Subject is set to read-only it will be hidden. This is helpful in standardizing workflow names for record-keeping purposes.</p> <p>This setting also allows you to link field values listed in a drop-down window to control the subject description value.</p> <p>The <b>Subject Set To</b> field displays when this checkbox is selected.</p>  <p>Click <b>Add</b> to open the Edit Expression window and make selections as to what the subject value will be.</p> <p>Click Select Field and select values with operators. This dialog box functions identical to the <a href="#">Add Assignments</a> page.</p> <p>When external workflows are designed, e-Builder honors the subject read-only and tracking prefix settings when the document is generated. If the workflow is copied, the Subject field settings persist.</p>
Subject Set To	<p>This field displays when the Subject Read Only checkbox is selected. Use this field to create a standard subject, giving users one less field to complete.</p>
Has Tracking	<p>For tracking purposes, select this checkbox to indicate that an assigned code already exists.</p>

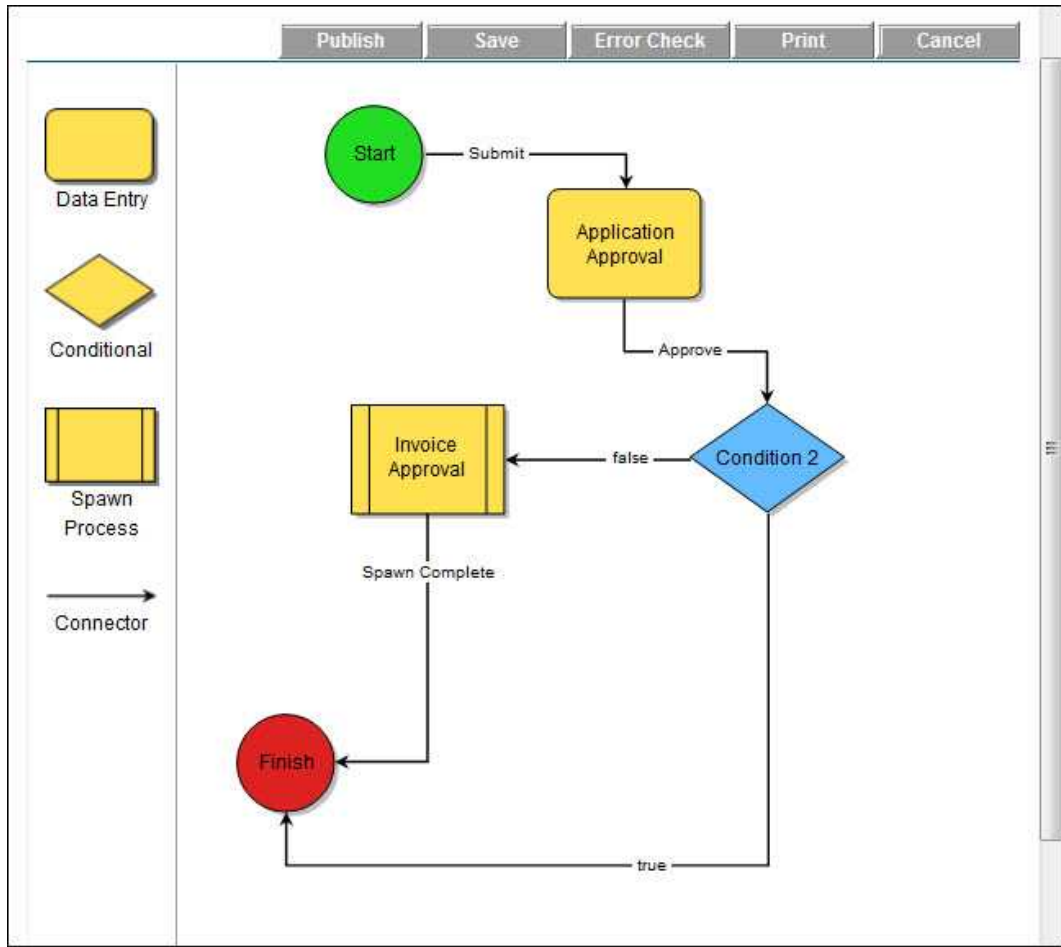
ki ng Pr efi x	
Ac co un t De fa ult	<p>This field only displays in edit mode. Select this check box to make this workflow the default option for all projects if a project isn't selected in the <b>Project Assignments</b> section or for just the assigned projects.</p> <p> <b>Note:</b> A default account workflow is automatically created when a process is created. If you did not modify the workflow, the system-generated account default is used, which simply has a start and finish step.</p>

#### 1.18.7.7.3 Workflow Designer Icons Overview

The Workflow Designer allows you to drag and drop different shapes onto the Workflow that perform different functions. Each can help build your workflow to facilitate an automated business process. The workflow includes steps, connectors, conditionals, and spawns all based on actions triggered in each workflow step.







The process is automatically routed through the workflow. When the process reaches a data entry step it will display the associated actor layout to the end user and require that an action be taken, which determines which branch the workflow will follow. Each of these shapes can be dragged onto the Designer grid. Once the shape is dragged onto the screen the properties window of that shape displays for your input.




Below is a brief description of each shape, its function, and a description of the buttons located on the workflow designer page.

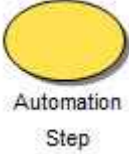



Button/Shape	Description
<p data-bbox="387 1272 555 1317"><b>Publish</b></p>	<p data-bbox="587 1279 1390 1536">Click Publish to make the process available to all assigned users. Incomplete workflows cannot be published. If process steps are incomplete or a connector is missing, an error message displays the details of the error. Publishing a workflow allows you assign it to projects or make it available to projects if one is already assigned.</p> <p data-bbox="587 1570 1385 1827">When attempting to publish a workflow that has already been used by an end user, the system grays out certain elements of the process that cannot be changed, there are fields, however that can be changed. If you need to change fields that cannot be altered, then a new workflow has to be created with a different name. The newly created workflow</p>



	will not be assigned to any projects; you must physically make it the account default if you so choose. For information on assigning projects to workflows, see <a href="#">Add New/Edit Workflow Page Overview</a> – Account Default check box.
	Click Save to save the workflow. You can close out of the workflow and return to it later on. Saved workflows are not visible to anyone else and are not available for use in any projects. The process will only use published workflows.
	Click Error Check to validate that the workflow is correct. Any errors will produce a detailed error message.
	Click Print to print the workflow as is.
	Click Cancel to close the Workflow dialog box without saving changes.
	The start icon displays by default. Every workflow process requires a star step. Right-click this icon and select Properties to edit step name, select a process layout, change icon color, or add a description.
	Data Entry is used to record process steps. Data Entry steps are to be completed by an actor of the step. Each time data is entered, an actor must take an action so that the workflow can move on its path toward completion. In addition, there may be required data fields. For example, a step could consist of a Director reviewing a set of data and selecting an 'Approve' action.  Drag this icon to the designer to open the <a href="#">Edit Step Dialog Box</a> and customize step properties.

 <p>Conditional</p>	<p>Conditional steps are defined statements that can take a path of true or false. It is configured to let the system determine the route in the workflow. For example, if a contract or PO has a commitment value greater than \$5,000 it may have to be routed to the Assistant Director. Otherwise the project manager can approve it without requiring executive management approval. Double-click or drag and drop this shape to the designer to open the Edit Conditional Branch dialog and configure the details of this condition.</p> <p>Drag this icon to the designer to open the <a href="#">Edit Conditional Branch Dialog Box</a> and customize step properties.</p>
 <p>Spawn Process</p>	<p>The spawn process icon is used to kick off another process at the end of the process being created. Using this feature, you are able automate the start of another process that is dependent on the one you're creating. It is important to note that Drag and drop this icon in the graphical pane. The Edit Step dialog box displays for you to input all pertinent information.</p> <p>Drag this icon to the designer to open the <a href="#">Spawn Edit Step Dialog Box</a> and customize step properties.</p>
 <p>Connector</p>	<p>The connector is used to connect the steps in the workflow. Right-click the connector and click Properties to open the Connector Properties dialog box. From here you choose the start and end steps to connect. You must also choose an action. Only available actions that have not yet been used are available in the drop-down arrow. Optionally, you can rename the connector, choose the connector shape and design the workflow step by choosing where the points of the connector will be placed.</p>


	<p>The Automation step icon is used to automatically archive a mail merge template in the document library and/or send it in an email. This step can be added within any sequence of the workflow.</p> <p>Drag this icon to the designer to open the <a href="#">Edit Automation Step Dialog Box</a> and customize step properties.</p>
	<p>The finish icon displays by default. Every workflow process requires a finish step. Right-click this icon and select Properties to edit step name, select roles that should be notified when the step enters the finish step, select a process layout, change icon color, or add a description.</p>

#### 1.18.7.7.4 Edit Step Page Overview

The Edit Step dialog box displays when you drag a Data Entry shape to the designer grid. This dialog box is able for you to customize the workflow step. In order for a step to run properly, there must be at least one action, and at least one role assigned.

See [Workflow Designer Icons Overview](#) for more information about Data Entry and other workflow shapes. A detailed description of each field is listed below to guide you through the process of customizing each workflow step.

Field	Description
<b>Name</b>	This is a required field. Enter the name of the step in this field.
<b>Description</b>	Enter a description of the process step in this field. This description displays along with the name of the step when you hover over the step in the workflow designer.
<b>Enable Flexible Routing</b>	Click this check box to allow the actors in this step to forward the step to another project participant, whom in return can forward to another participant or reply back to the actor. The actor is the only one that can take action to move it to the next step, and the actor can decide to take the action at anytime,

	<p>whether it has been forwarded or not. If this check box is not selected, the Forward and Reply buttons will not display on the process step.</p>
<p><b>Send Comment Notifications To Actors</b></p>	<p>Select this check box to have an email notification sent to the actors in this step every time a comment is made or an action is taken on this step.</p> <p> <b>Note:</b> Process notification settings take precedence over the settings configured here. Project notification settings are located via Projects – Project Administration section on the left side of the page – Process Notification Settings</p>
<p><b>Disable mail merge for this step</b></p>	<p>Select this check box to disable printing in this particular step of the process. You might choose to use this setting to avoid the printing of unapproved or incomplete data, which might be prematurely routed for approval. Disabling printing at certain process steps will also evade the distribution of multiple versions of information.</p>
<p><b>External Participation</b></p>	<p>This field may or may not be visible to you. The external participation feature is typically turned on during implementation if it is determined that there is a need for this capability. Enabling external participation allows an external participant to initiate a process via email.</p> <p>Determine whether the external process initiator will be an actor or non-actor, and then select the appropriate check box. You are prompted to select a destination folder where attached files will be placed.</p> <p>For more information on external workflow participants, see <a href="#">About External Workflow Processes</a>.</p>
<p><b>Actors</b></p>	<p><b>Process Initiator</b> - Select this check box to add the process initiator, or the user who filled out the start step, as an actor. Typically used in scenarios where you need to route back to the initiator of the process because of a rejection from an approver.</p> <p>In the Available Role box, select the actors on this step and</p>

	<p>then click Add. Selected actors display in the adjacent Selected Roles box. The process step will display in these actor's courts for further action to move the process along. Actors are the only users that can take the action to move the process to the next logical step in the workflow.</p>
<b>Notify</b>	<p><b>Process Initiator</b> - Select this check box to send notifications to the process initiator when the process enters this step.</p> <p>In the Available Role box, select users on the project to receive notification when the process enters this step. Click Add. Selected users display in the adjacent Selected Roles box.</p>
<b>Actor Layout</b>	<p>Click the drop-down arrow to select from a list of layouts defined on the <a href="#">Layout Properties page</a> for the process. The selected layout is what is shown for the actors when the workflow enters this step. Press the Preview button to see what the layout will look like for the end user.</p> <p>See <a href="#">Add Page Layouts</a> for more information.</p>
<b>Non Actor Layout</b>	<p>Click the drop-down arrow to select a non actor layout defined on the <a href="#">Page Layout Properties page</a> for the process. The selected layout is what is shown for the non-actors when the workflow enters this step. Press the Preview button to see what the layout will look like for the end user. Defining a non actor layout here may not be necessary if you've already defined a default non actor layout in the layout properties.</p> <p>See <a href="#">Add Page Layouts</a> for more information.</p>
<b>Custom View Link Name</b>	<p>If you are using a custom link, enter the title of the link in this field. Custom views may be available per request.</p>
<b>Custom View Link</b>	<p>If available on the account, enter the URL of the custom view in this field.</p>
<b>Due Date</b>	<p>Click the Step specific due date checkbox to specify the amount</p>

	<p>of days required to complete the step. Once this checkbox is selected, the following fields display:</p> <ul style="list-style-type: none"> <li>• <b>Allowed days for completion:</b> Enter the number of days required to complete this step. The counter begins from the day the step enters the actor's court.</li> <li>• <b>Keep original due date when revisiting step:</b> Select this check box to standardize this completion date for all iterations of the process.</li> <li>• <b>Allow actor to update the step due date:</b> Select this check box to grant the actor permission to determine due date. Actor is prompted to set due date when step is first opened.</li> </ul>
<b>Background Color</b>	<p>Click this button to change the background color of the step. Having different colors for specific steps or roles can help you identify the rate of involvement for different roles or people. This can also help you quickly identify how often certain process instances occur.</p>
<b>Text Color</b>	<p>Click this button to change the text color of the step's title. For increased readability, certain text colors may stand out against different background colors more than others.</p>
<b>Add Action</b>	<p>The action is what's required to get you out of a step. For example, Approve, Deny, Completed, Reject etc. Every step requires an action. You are prompted to specify the action when <a href="#">adding a connector between steps</a>. Click Add Action to enter the details of the action. A step cannot be saved without an action. The maximum number of actions that can be configured per step is six.</p> <p>For a description of the fields located on the Add Action dialog box, see <a href="#">Add Action Page Overview</a>.</p>
<b>Instructions Tab</b>	<p>Click this tab to add step-specific instructions. These</p>

	instructions display as a Help link in the step view for actors and non-actors.
<b>Escalation Rules Tab</b>	<p>Click this tab to define escalation rules for this data entry step. Escalation rules are automated reminders for users to complete a past due task. When defined at the step level the rule only applies to this step. Escalation rules created at the workflow level are listed here and automatically inherited. You can decide whether to enforce those rules or disable them all by selecting the Disable for this step checkbox.</p> <p>See <a href="#">Add Escalation Rules</a> for more information.</p>

#### 1.18.7.7.5 Add Action Page Overview


An Action allows the data entry step to be completed. It is the mechanism that moves the process between steps; therefore, at least one action must be defined for each data entry step. Connectors are used to attach actions from one step to another. For instructions, see [Add Actions](#). Field-level descriptions are located in the table below:

Field	Descriptions
<b>Name</b>	Enter the name of the action as it will display in the workflow designer.
<b>Name Display</b>	Enter the name of the action as it will display in the user interface; maximum 15 characters.
<b>Set Status To</b>	<p>Click this drop-down arrow to choose what the default status of the process will be when this action is taken.</p> <p>If the process does not have cost module integration then the standard choices are:</p> <ul style="list-style-type: none"> <li>• Leave Status Unchanged</li> <li>• Approved</li> </ul>

	<ul style="list-style-type: none"> <li>• Paid</li> <li>• Pending</li> <li>• Projected</li> <li>• Received</li> <li>• Rejected</li> <li>• Submitted</li> <li>• Void</li> </ul> <p>If the process is integrated with a cost item then the status choices reflect the statuses of that cost item. For example, if a commitment change item is associated with the process then the 'Set Status To' options change to:</p> <ul style="list-style-type: none"> <li>• Draft</li> <li>• Approved</li> <li>• Pending</li> <li>• Projected</li> </ul> <p>For cost items, the 'Approval Requested' check box displays. If selected, an approval will be requested before the step can be completed. This setting is beneficial if there is a step or series of steps that is routed for approval.</p>
<b>Causes Field Validation?</b>	Select this check box to enforce required fields. This check box is selected by default and enables data field validation on any type of process. This setting only applies to data fields and objects custom fields.
<b>Causes Cost Control Validation</b>	This check box displays only when a status other than Approved, Paid or Received is selected from the 'Set Status To' drop-down menu. Select this check box to enforce cost control validation on draft, pending and projected status items.
<b>Require Password?</b>	Select this check box to require users to enter their password when taking this action.
<b>Show</b>	Select this check box to display a confirmation message



<b>Confirmation?</b>	<p>asking users if they are sure they want to proceed with the action. An text box displays for you to optionally add an additional message or instructions.</p> <p>Based on the process, critical actions or data fields may be entered and it can be beneficial for users to think twice before submitting data or proceeding with the action.</p>
<b>Add Comments?</b>	<p>Select this check box to prompt the actor to enter a comment.</p> <p>A good scenario would be if the step requires an approval and if the action taken is 'Revise' and you want to force the actor to enter a comment as to why he/she rejected the item and is routing back to the initiator to revise it. If selected, a dialog box appears as the action is taken to prompt the actor to enter a comment.</p> <p>The <b>Require Comment</b> check box also displays when this check box is selected giving you the option to make the comment field required.</p>
<b>Notify</b>	<p><b>Process Initiator</b> - Select this check box to send notifications to the process initiator when this action is taken.</p> <p>In the Available Roles section, select the roles you want to receive an email notification as the action is taken. Click 'Add'. The selected roles display in the adjacent 'Selected Roles' box.</p>
<b>Add Actors To Next Step</b>	<p><b>Allow user to add actors to the next step:</b> Click this checkbox to allow the actor to select additional actors for the next step. This setting allows a bit of flexibility in an otherwise structured flow. You may set this if you do not know if there are additional actors. Over time you can identify trends in routing and change it to be structured later.</p> <p><b>Include actors that took action from previous step on the</b></p>

	<p><b>next step:</b> Select this check box to include on the next step the actors who took action(s) prior to this step (they need not be immediately prior). If the last step had a majority for the action, the "last actor" would be all actors that contributed to the action. The "last actor" is defined as the last person to take a human action. Also, note that conditional branching and spawn steps will be ignored in regressing through the action.</p> <p>If a workflow is configured to go back to a step for which an actor took action, and that step had more than one potential actor, e-Builder will only notify the actor who took action, not all of the actors. The feedback or clarification should only go to that one person.</p> <p> <b>Note:</b> Even if a step does not have actors selected, a workflow can be valid with this setting alone. It suffices as a selection of actors.</p>
<p><b>Give Review and Comment Access</b></p>	<p><b>Allow user to give other users access to review and comment on the process:</b> Select this check box to choose users to provide access for comment and review.</p> <p><b>Allow user to request external comment:</b> Select this check box to give users in the workflow the permission to solicit comments from external actors. Although external users cannot take action on a step, allowing them to add comments is great way to capture information. Note that external comments cannot be requested when using workflow offline.</p>
<p><b># of Actors to Complete Action</b></p>	<p>To set a standard for the number of actors that are required to complete an action, select one of the available options:</p> <ul style="list-style-type: none"> <li>• One Actor</li> <li>• Majority</li> <li>• All Actors</li> </ul>

<b>Add Assignment</b>	Click this button to add data field assignments to the action. The <a href="#">Add Assignment</a> dialog box displays to help you create and save field assignments. The up and down arrows to the left of the 'Add Assignment' button allow you to change the order the data assignments will be executed.
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#### 1.18.7.7.6 Add Assignment Page Overview

Data field assignments are a mechanism for auto-populating Admin-defined data taken from project details and exposing them into the process. The ability to do so eliminates the need to locate information that already exists elsewhere within e-Builder. Data assignments can be very simple, such as automatically inserting the current date and time into a process data field or the square footage for a budget approval process, to more complex information that may include formulas, such as the sum of the current contract value on a commitment and the change amount.

Setting up these data fields is optional, but they can reduce the time it takes users to fill-out data fields and provide necessary information they need without having to search through the system, such as the original commitment value in a change order process.

Below are detailed descriptions of the fields located on the Add Assignment page.

<b>Field</b>	<b>Description</b>
<b>Assign to Field</b>	Click this drop-down arrow to select the data field you want to assign expressions to. Note that the 'Assign to' field can contain varying selections depending on fields configured. Typically, at a minimum it will contain three sections: Data Fields, Project Fields, Project Custom Fields and if configured, Process Custom Fields, Budget, Budget Change, Commitment, Commitment Change, and Actual Cost Custom Fields as well.
<b>Select Field</b>	The selections in this drop-down arrow will also vary depending on the fields configured. Moreover, if the workflow is for a cost-related process, it will contain many more fields, specific to cost.

<b>Insert</b>	<p>There are two Insert buttons located on this page. The first, from left to right allows you to add the selections from the 'Assign to Field' and Select Field' into the 'Assignment Expression' box.</p> <p>The second allows you to insert the selected function into the 'Assignment Expression' box.</p>
<b>Operators</b>	Operators are used to build formulas between data fields.
<b>Functions</b>	<p>Functions are predefined expressions that allow you to input data to complete assignment expressions. The options in this drop-down arrow appear by default. Below is an explanation of each:</p> <p><b>Now()</b> – Returns the current date and time:</p> <ol style="list-style-type: none"> <li>1. Select this function.</li> <li>2. Click <b>Insert</b>.</li> <li>3. Select a field from the <b>Assign to Field</b> drop-down arrow.</li> <li>4. Click <b>Save</b>.</li> </ol> <p><b>Today()</b> – Returns the current date:</p> <ol style="list-style-type: none"> <li>1. Select this function.</li> <li>2. Click <b>Insert</b>.</li> <li>3. Select a field from the <b>Assign to Field</b> drop-down arrow.</li> <li>4. Click <b>Save</b>.</li> </ol> <p><b>MinDate(value1, value2)</b> – Minimum date (applies to date fields only): Returns the smaller of two specified date values. <i>Value1</i> is the first of the two numeric values to compare. <i>Value2</i> is the second of the two numeric values to compare.</p> <p><b>MaxDate(value1, value2)</b> – Maximum date (applies to date fields only): Returns the larger of two specified numeric values. <i>Value1</i> is the first of the two numeric values to compare. <i>Value2</i> is the second of the two numeric values to</p>

compare.

**IIF String (Condition, true string, false string)** – If and only if (applies to text fields only):

Evaluates the given *condition* and returns the text for *true string* if the evaluation succeeds or the text for *false string* if the evaluation fails.

*Condition:* Boolean expression used to determine which text to return.

*True String:* If condition evaluates success then this text value is returned.

*False string:* If condition evaluates failure then this text value is returned.

1. Select this function.
2. Click **Insert**.
3. Place your cursor before the first comma, enter the condition by selecting a data field from the **Select Field** drop-down arrow, and then click **Insert**.
4. Place your cursor before the second comma, enter the 'if true value' by selecting a data field from the **Select Field** drop-down arrow and clicking insert or manually type the text in quotes.
5. Place your cursor after the second comma, enter the 'if false value' by selecting a data field from the **Select Field** drop-down arrow or manually typing the text with surrounding quotation marks.
6. Select a field to assign the formula to from the **Assign to Field** drop-down menu.
7. Click **Save**.

**IIF Number (Condition, true string, false string)** – If and only if (applies to number fields only):

Evaluates the given *condition* and returns the number in *true number* if the evaluation succeeds or the number in *false number* if the evaluation fails.

*Condition:* Boolean expression used to determine which

number to return.

*True String:* If condition evaluates success then this number value is returned.

*False string:* If condition evaluates failure then this number value is returned.

1. Select this function.
2. Click **Insert**.
3. Place your cursor before the first comma, enter the condition by selecting a data field from the **Select Field** drop-down arrow, and then click **Insert**. (i.e. Contract Sum)
4. Place your cursor before the second comma, enter the 'if true' number by selecting a data field from the **Select Field** drop-down arrow and clicking insert or manually type the text in quotes.
5. Place your cursor after the second comma, enter the 'if false' number by selecting a data field from the **Select Field** drop-down arrow or manually typing the number with surrounding quotation marks.
6. Select a field to assign the formula to from the **Assign to Field** drop-down menu.
7. Click **Save**.

**IIFDate(Condition, true string, false string)** – If and only if (applies to date fields only):

Evaluates the given *condition* and returns the date in *true date* if the evaluation succeeds or the date in *false date* if the evaluation fails.

*Condition:* Boolean expression used to determine which date to return.

*True String:* If *condition* evaluates success then this date value is returned.

*False string:* If *condition* evaluates failure then this date value is returned.

1. Select this function.

2. Click **Insert**.
3. Place your cursor before the first comma, enter the condition by selecting a data field from the **Select Field** drop-down arrow, and then click **Insert**. (i.e. Contract Sum)
4. Place your cursor before the second comma, enter the 'if true' date by selecting a data field from the **Select Field** drop-down arrow and clicking insert or manually type the date in quotes.
5. Place your cursor after the second comma, enter the 'if false' date by selecting a data field from the **Select Field** drop-down arrow or manually type the date in quotes.
6. Select a field to assign the formula to from the **Assign to Field** drop-down menu.
7. Click **Save**.

**IsInList (list, value)** – Multi-Pick List - This function allows you to include “and” and “or” for more complex conditions that include options from the multi-pick list.

1. Select this function.
2. Click **Insert**.
3. Place your cursor before the comma and select a multi-pick list from the **Select Field** drop-down arrow.
4. Click **Insert**.
5. Place your cursor after the comma and enter the value in quotes.
6. Select a field from the **Assign to Field** drop-down arrow.
7. Click **Save**.

**IsNullDate(date)** – Allows you to determine whether or not a value exists for this date field. If it does, then it will be factored into the formula.

**IsNullString(value)** – Allows you to determine whether or not a value exists for this string field. If it does, then it will be factored into the formula.

**RemoveWhiteSpace(value)** – Returns the given value with extra spaces removed. This function removes both leading and trailing spaces from the text as well as converting blocks of multiple spaces within the text into a single space character. (e.g. 'the text' becomes 'the text'). “Value” is the text to remove extra spaces from.

**Trim (value)** - Removes white space from text.

**Find (similar to VB Instr)** – Finds a string within a string & returns the character number where the search string is found.

**Left (source value, length number)** – Use to find a specified number of characters from the left (beginning) of a string.

**Mid (source value, start position number, length number)** - Returns the middle x characters of a string, starting at position y within the string

**Right (source value, length number)** - Returns a specified number of characters from the right (end) of a string.

**Substitute (source value, search value, substitution value)** - Changes characters within a String.

**Replace (source value, start position number, length)** – Used to replace characters within a text.

**Rev (source value)** - Returns a reversed string. For example, REV(“Luke”) returns “ekuL”

**Len (source value)** - Returns the length of the inputted variable.



	<p><b>MinNumber(value1, value2)</b> – Minimum number: Returns the smaller of two specified numeric values. <i>Value1</i> is the first of the two numeric values to compare. <i>Value2</i> is the second of the two numeric values to compare.</p> <p><b>MaxNumber(value1, value2)</b> – Maximum number: Returns the larger of two specified numeric values. <i>Value1</i> is the first of the two numeric values to compare. <i>Value2</i> is the second of the two numeric values to compare.</p>
<b>Assignment Expression</b>	This box contains the expressions of the data field assignment as they are selected and inserted by the user. This is where finalized expressions go before saving the data assignment. If there is an error with the expression, you will receive an error message and will not be able to save the expression until corrections are made.
<b>Save</b>	Click this button to save the data assignment. If the expression is invalid, an error message displays for you to make necessary corrections.
<b>Cancel</b>	Click this button to cancel the operation and close this dialog box.

### Related Topics:


- [Add Data Field Assignments](#)


#### 1.18.7.7.7 Add Escalation Rule Page Overview

Escalation rules allow you to set up automatic escalations based on certain conditions. For instance, you may want to escalate to the director of construction if a potential change order has aged five days after the process due date and the commitment change value is greater than \$10,000. Escalation rules allow you to setup these conditions and initiate an escalation email to the director of construction.

Escalation rules can be set for an entire workflow or for just a step in the process.

Workflow-level escalation rules will send an email notification for every step that meets the conditions set by the rule.

 **Note:** Escalation rules can be set for specific steps in a process for an entire workflow. If set for a specific step then the escalation will only occur if the step meets the defined escalation requirement. Remember, if set at the workflow level and the escalation is defined by the step start or due date then for every step that meets that condition the notification will be sent.

 **Note:** Once a rule is saved it shows up in the Escalation Rules grid with Edit and Delete links. The maximum amount of escalation rules that can be set for a workflow is five.

A detailed description of each field located on the Add Escalation Rule page is listed below:

Field	Description
<b>When</b>	Enter time-sensitive criteria that will determine when the escalation is sent.
<b>Condition</b>	Optionally, you can include conditions in the escalation rule which are expression builders for field assignments.
<b>Notify</b>	<p>This section allows you to determine who will be notified. You can set the rule to notify the initiator of the process, the accepted actor of the current step, all actors, the Administrators or specific roles. Select the various groups of users and press the Add button to add them to the Selected grid.</p> <p>When at least one role is selected, the Add Role(s) as field appears, giving you the option to select whether the roles are Non Actors or Actors. See the description of this field below for more information.</p>
<b>Add Role(s) as</b>	This field appears when at least one role is selected in the Notify field.

	<p><b>Non Actors (Comments Only)</b> – Select this option to assign notified parties as non actors, which will only enable them to add comments, and not the ability to take action on the escalation.</p> <p><b>Actor</b> – Select this option to assign notified parties as actors, which will only enable them to take action on the escalation.</p>
<b>Re-notify Every</b>	Click the Day(s) drop-down arrow and select Day(s) or Hour(s). Enter the amount of days or hours you want users to be re-notified.
<b>Override Process Notification Settings</b>	Select this check box to override the project notification settings, which will otherwise take precedence.

#### Related Topics:

- [Add Escalation Rules](#)

#### 1.18.7.7.8 Edit Conditional Branch Page Overview

Conditional steps are defined statements that can take a path of true or false. It is configured to let the system determine the route in the workflow. For example, if a contract or PO has a commitment value greater than \$5,000 it may have to be routed to the Assistant Director. Otherwise the project manager can approve it without requiring executive management approval. Double-clicking or dragging and dropping the Conditional shape to the designer opens the Edit Conditional Branch dialog box.

A description of all the fields located on this page is listed below.

Field	Description
<b>Name</b>	Enter the name of the conditional step in this field. This name will also appear on the conditional shape in the designer.

e	
<b>Condition</b>	<p>This field displays the conditional statement. To add a data field, click the Select Field drop-down arrow to make a selection. If the data field is a drop-down or multi-select data field type then a Lookup button will show assisting you in selecting the available values. Click the Insert button to add the field to the condition field. Use the operators to add the second portion of the statement. Optionally, you can click the Functions drop-down arrow and then click Insert to enter the final portion of the statement. The entire statement or parts of the statement can be typed into this field.</p>
<b>Operators</b>	<p>If the conditional statement requires the use of an operator, click the appropriate operator button. For example, if you want the conditional statement to return True or False based on a commitment value then you can add the greater than (&gt;) operator in the statement - {CostCommitmentChange.Amount} &gt; 5000.</p>
<b>Functions</b>	<p>Functions are predefined expressions that allow you to input data to complete assignment expressions. The options in this drop-down arrow appear by default. Below is an explanation of each:</p> <p><b>Now()</b> – Current date and time:</p> <ol style="list-style-type: none"> <li>1. Select this function.</li> <li>2. Click <b>Insert</b>.</li> <li>3. Select a field from the <b>Assign to Field</b> drop-down arrow.</li> <li>4. Click <b>Save</b>.</li> </ol> <p><b>Today()</b> – Current date:</p> <ol style="list-style-type: none"> <li>1. Select this function.</li> <li>2. Click <b>Insert</b>.</li> <li>3. Select a field from the <b>Assign to Field</b> drop-down arrow.</li> <li>4. Click <b>Save</b>.</li> </ol>

**Date (value)** - Allows you to convert a date in string form to a date type. *Value* is the string value.

Examples:

Formula	Sample Output
Date("12.10.2013")	12.10.2013
Date("12-10-2013")	12.10.2013
Date("12/10/2013")	12.10.2013
IIFDate( 1 > 2, Date("12.10.2013"), Date("12.12.2013"))	12.10.2013
MaxDate(Date("12.10.2013"), Date("12.12.2013"))	12.10.2013

**IIF String (Condition, true string, false string)** – If and only if (applies to text fields only):

1. Select this function.
2. Click **Insert**.
3. Place your cursor before the first comma, enter the condition by selecting a data field from the **Select Field** drop-down arrow, and then click **Insert**.
4. Place your cursor before the second comma, enter the 'if true value' by selecting a data field from the **Select Field** drop-down arrow and clicking insert or manually type the text in quotes.
5. Place your cursor after the second comma, enter the 'if false value' by selecting a data field from the **Select Field** drop-down arrow or manually typing the text with surrounding quotation marks.
6. Select a field from the **Assign to Field** drop-down arrow.
7. Click **Save**.

**IIF Number (Condition, true string, false string)** – If and only if (applies to number fields only):

1. Select this function.
2. Click **Insert**.
3. Place your cursor before the first comma, enter the condition by selecting a

data field from the **Select Field** drop-down arrow, and then click **Insert**. (i.e. Contract Sum)

4. Place your cursor before the second comma, enter the 'if true number by selecting a data field from the **Select Field** drop-down arrow and clicking insert or manually type the text in quotes.
5. Place your cursor after the second comma, enter the 'if false number by selecting a data field from the **Select Field** drop-down arrow or manually typing the number with surrounding quotation marks.
6. Select a field from the **Assign to Field** drop-down arrow.
7. Click **Save**.

**IsInList (list, value)** – Multi-Pick List (This function allows you to include “and” and “or” for more complex conditions that include options from the multi-pick list.

1. Select this function.
2. Click **Insert**.
3. Place your cursor before the comma and select a multi-pick list from the **Select Field** drop-down arrow.
4. Click **Insert**.
5. Place your cursor after the comma and enter the value in quotes.
6. Select a field from the **Assign to Field** drop-down arrow.
7. Click **Save**.

**Trim (value)** - Removes white space from text.

**Find (similar to VB Instr)** – Find a string within a string & return the character number where the search string is found


**Left (source value, length number)** – Use to find a specified number of characters from the left (beginning) of a string.

	<p><b>Mid (source value, start position number, length number)</b> - Returns the middle x characters of a string, starting at position y within the string</p> <p><b>Replace (source value, start position number, length)</b> – Used to replace characters within a text.</p> <p><b>Right (source value, length number)</b> - Returns a specified number of characters from the right (end) of a string.</p> <p><b>Substitute (source value, search value, substitution value)</b> - Changes characters within a String.</p> <p><b>Rev (source value)</b> - Returns a reversed string. For example, REV(“Luke”) returns “ekuL”</p> <p><b>Len (source value)</b> - Returns the length of the inputted variable</p>
<b>Background Color</b>	Click this button to select a background color for the conditional step, which displays in the Designer.
<b>Text Color</b>	Click this button to select a background color text of the conditional step, which displays in the Designer.
<b>True/False</b>	The True and False actions are automatically provided for conditional branch steps and cannot be changed. You can however edit these actions to add Data Field Assignments or Notify users when the action is taken. Remember, data field assignments allow you to configure it so when the action occurs an assigned value can be automatically set to a data field.



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## 1.18.7.7.9 Add/Edit Connector Page Overview

Connectors link two shapes together. The first time you add a connector, the Add Connector Page displays. The Edit Connector page appears when editing existing or adding additional connectors. This dialog gives you all necessary options to [connect steps in a workflow](#), [select an action](#) and design the connector. A description of each field located on this page is provided below.


Field	Description
<b>From Step</b>	Click this drop-down arrow and select the step the connector will connect from.
<b>Action</b>	Click this drop-down arrow and select the action that will connect the two steps. Options in this drop-down arrow populate based on all available actions.
<b>To Step</b>	Click this drop-down arrow and select the step the connector will connect to.
<b>Connector Text</b>	<p>Enter the text that will display on the connector within the workflow.</p> 
<b>Type</b>	<p>Select a type option to determine the way the connector links the two steps.</p> <p><b>Elbow</b> – (Default setting) the Designer will automatically create an elbow when one of the two steps deviates off of a straight line course.</p>




	<p><b>Straight</b> –The Connector will always display as a straight line.</p>
<b>From Step Connection Point</b>	<p>Click the drop-down arrow to select a connection point from the From Step. The default is set to Auto. You can determine the connection point on the shape by selecting one of the options (Top, Bottom, Left, Right). If set to Auto, the system will determine the best connection point for you.</p> <p> <b>Tip:</b> If you click on two data entry steps in the Designer (will highlight a blue border when selected) and then drag and drop the connector to the Designer, the From Step and To Step fields will automatically be filled in. The first data entry step you select will be assigned to the From Step.</p>
<b>To Step Connection Point</b>	<p>Click the drop-down arrow to select a connection point to the To Step. The default is set to Auto. You can determine the connection point on the shape by selecting one of the options (Top, Bottom, Left, Right). If set to Auto, the system will determine the best connection point for you.</p> <p> <b>Tip:</b> If you click on two data entry steps in the Designer (will highlight a blue border when selected) and then drag and drop the connector to the Designer, the From Step and To Step fields will automatically be filled in. The first data entry step you select will be assigned to the From Step.</p>
<b>Save</b>	<p>Click this button to save changes and exit the Add/Edit Connector dialog box.</p>
<b>Cancel</b>	<p>Click this button to cancel this action and exit the Add/Edit Connector dialog box. Note that changes will not be saved.</p>

## 1.18.7.7.10 Spawn Edit Step Page Overview

The Spawn Edit Step dialog box displays when you drag and drop a spawn shape onto the workflow designer or right-click the shape and click Properties. This page allows you to edit the properties of the spawn step. A detailed description of each field is located below.

Field	Description
<b>Name</b>	Enter the name of the spawn process step in this field. This text also displays in the designer.
<b>Send Comment Notifications To Actors</b>	Select this check box to have an email notification sent to the actors in this step every time a comment is made or an action is taken on this step.   <b>Note:</b> Process notification settings take precedence over this setting. For more information, see Project Process Notification Settings Page Overview.
<b>Description</b>	Enter a description to be used to further describe the step. This description displays in the workflow designer when the mouse hovers over the shape.
<b>Spawn Process</b>	Click this drop-down arrow to select the spawned process. A list of active processes configured in the account populates in the drop-down arrow for you to choose from.
<b>Spawned Process Initiator</b>	Select the actor for this spawned process.  <b>Parent Process Initiator</b> - This is the default selection. Leave this option selected to have the parent process listed as the process initiator, which will not inherit any user information.  <b>Last Actor on Parent Process</b> - Select to make the previous step actor the process initiator on this spawned process. This allows you to hold someone accountable for the spawned process, as the spawned process will inherit information about the process initiator.


	<p><b>Automatically Spawned</b> - Select this option if you do not want to list a person as the process initiator. The initiator will be listed as 'Automatically Spawned.'</p>
<b>Copy Attached Files</b>	<p>Select this check box to automatically copy the attached files from this process to the spawn process. By default this check box is not selected.</p>
<b>Copy Cost Data</b>	<p>This check box displays only if both the parent and the spawned process are of the same cost type and all other cost settings for the process match exactly. This check box should be selected if the user wants the spawned process to receive all the cost data (including line items, amounts, funding and custom fields) from the parent cost process. The spawned process will also then be submitted.</p> <p>If the spawned process is set to check for cost controls on the start step, the cost data will be carried forward but the process will not be submitted.</p> <p> <b>Note:</b> This feature applies to all cost types, with the exception of Actual Cost - User Choice cost processes. For more information, see <a href="#">About Cost Processes</a>.</p>
<b>Layout</b>	<p>Click this drop-down arrow to select a <a href="#">page layout</a> for this spawn process step. Remember the spawn process step will remain the current active step until the child process start step completes. If the child process does not complete right away then the process will remain in this step.</p>
<b>Actors</b>	<p><b>Process Initiator</b> – Select this check box to make the process initiator an actor on this spawn step.</p> <p>Select roles in the 'Available Roles' section and click Add to adding members of these roles as actors for this step. If the child start step does not complete automatically then these actors (in addition to the e-Builder administrators) can access the start step. The start step will remain in draft</p>


	format until manually processed by one of these actors.
<b>Background Color</b>	Click this button to select a background color for the conditional step which will display in the workflow designer. The default color is yellow.
<b>Text Color</b>	Click this button to select a text color for the conditional step which will display in the workflow designer. The default color is black.
<b>Required Fields</b>	If the spawn process selected has required data fields in the start step layout then this is where you map those fields. You have to map the required fields in order to save the spawn process step.
<b>Optional Fields</b>	The optional fields can be mapped to data fields in the spawn start step layout. It is up to you whether you want to include mapping for these fields or not.
<b>Other Fields</b>	The other fields can be mapped to data fields in the spawn start step layout. It is up to you whether you want to include mapping for these fields or not.

#### 1.18.7.7.11 Spawn Edit Step

The Spawn Edit Step dialog box displays when you drag and drop a spawn shape onto the workflow designer or right-click the shape and click Properties. This page allows you to edit the properties of the spawn step. A detailed description of each field is located below.

Field	Description
<b>Name</b>	Enter the name of the spawn process step in this field. This text also displays in the designer.
<b>Send Comment</b>	Select this check box to have an email notification sent to the actors in this step every time a comment is made or an

<b>Notifications To Actors</b>	<p>action is taken on this step.</p> <p> <b>Note:</b> Process notification settings take precedence over this setting. For more information, see Project Process Notification Settings Page Overview.</p>
<b>Description</b>	<p>Enter a description to be used to further describe the step. This description displays in the workflow designer when the mouse hovers over the shape.</p>
<b>Spawn Process</b>	<p>Click this drop-down arrow to select the spawned process. A list of active processes configured in the account populates in the drop-down arrow for you to choose from.</p>
<b>Spawned Process Initiator</b>	<p>Select the actor for this spawned process.</p> <p><b>Parent Process Initiator</b> - This is the default selection. Leave this option selected to have the parent process listed as the process initiator, which will not inherit any user information.</p> <p><b>Last Actor on Parent Process</b> - Select to make the previous step actor the process initiator on this spawned process. This allows you to hold someone accountable for the spawned process, as the spawned process will inherit information about the process initiator.</p> <p><b>Automatically Spawned</b> - Select this option if you do not want to list a person as the process initiator. The initiator will be listed as 'Automatically Spawned.'</p>
<b>Copy Attached Files</b>	<p>Select this check box to automatically copy the attached files from this process to the spawn process. By default this check box is not selected.</p>
<b>Copy Cost Data</b>	<p>This check box displays only if both the parent and the spawned process are of the same cost type and all other</p>

	<p>cost settings for the process match exactly. This check box should be selected if the user wants the spawned process to receive all the cost data (including line items, amounts, funding and custom fields) from the parent cost process. The spawned process will also then be submitted.</p> <p>If the spawned process is set to check for cost controls on the start step, the cost data will be carried forward but the process will not be submitted.</p> <p> <b>Note:</b> This feature applies to all cost types, with the exception of Actual Cost - User Choice cost processes. For more information, see <a href="#">About Cost Processes</a>.</p>
<b>Layout</b>	<p>Click this drop-down arrow to select a <a href="#">page layout</a> for this spawn process step. Remember the spawn process step will remain the current active step until the child process start step completes. If the child process does not complete right away then the process will remain in this step.</p>
<b>Actors</b>	<p><b>Process Initiator</b> – Select this check box to make the process initiator an actor on this spawn step.</p> <p>Select roles in the ‘Available Roles’ section and click Add to adding members of these roles as actors for this step. If the child start step does not complete automatically then these actors (in addition to the e-Builder administrators) can access the start step. The start step will remain in draft format until manually processed by one of these actors.</p>
<b>Background Color</b>	<p>Click this button to select a background color for the conditional step which will display in the workflow designer. The default color is yellow.</p>
<b>Text Color</b>	<p>Click this button to select a text color for the conditional step which will display in the workflow designer. The default color is black.</p>

<b>Required Fields</b>	If the spawn process selected has required data fields in the start step layout then this is where you map those fields. You have to map the required fields in order to save the spawn process step.
<b>Optional Fields</b>	The optional fields can be mapped to data fields in the spawn start step layout. It is up to you whether you want to include mapping for these fields or not.
<b>Other Fields</b>	The other fields can be mapped to data fields in the spawn start step layout. It is up to you whether you want to include mapping for these fields or not.

#### 1.18.7.7.12 Edit Automation Step Page Overview

The Automation step is used to automatically archive a mail merge template in the document library and/or send it in an email. This step can be added within any sequence of the workflow.

A description of the fields and buttons located on this page is provided below:

Field	Description
<b>Save</b>	Click this button to save changes and exit the Edit Automation Step dialog box.
<b>Cancel</b>	Click this button to cancel this action and exit the Edit Automation Step dialog box. Note that changes will not be saved.
<b>Automation Step Name</b>	Enter the name of the automation step in this field.
<b>Automation Step Type</b>	<p><b>Mail Merge</b> - Select to display all related mail merge template options.</p> <p><b>e-Signature File Download</b> - Select if this automation step is being added an e-Signature process and this step is being used to collect and download all signed documents.</p> <p>For more information on e-Signatures, see <a href="#">About Electronic Signatures</a>.</p>

<b>Mail Merge Template</b>	<p><b>Default Template:</b> Click this drop-down arrow to select a template. If custom templates are not available, the default template will be used.</p> <p>For information on adding process templates, see <a href="#">Processes Mail Merge Templates</a>.</p> <p><b>Include Attached Documents:</b> Select this check box to include documents that are attached to the process in the archived mail merge.</p>
<b>Archive Mail Merge</b>	<p>Select this check box to archive the mail merge template when the process enters this step. Additional options display:</p> <p><b>Destination Folder Lookup</b> Click the 'Lookup' link to select a destination folder within the e-Builder Documents module to send the document.</p> <p><b>Store in file field</b> Select this check box to also store the file in a <i>file type</i> data field. The mail merge template will then be available anywhere the data field displays within the process.</p> <p><b>Add as comment</b> Select this check box to display a comment when this process step. Enter the comment in the box provided.</p>
<b>Send to Process Initiator</b>	<p>Select this check box to send the mail merge template to the process initiator when the process has entered this automation step.</p>
<b>Send to Actors</b>	<p>Select this check box to send the mail merge template to select users in the process. Additional option display:</p> <p><b>User who took action on the previous step</b> Select this radio button to send the mail merge template to the user that took action on the step preceding this automation step.</p> <p><b>All actors from the previous step</b> Select this radio button to send the mail merge template to all actors on the previous step.</p>



<b>Send to Roles</b>	Select this check box to send the mail merge template to select roles. Click the Add button to move them to the adjacent 'Selected Roles' box.
<b>Send to Users</b>	Select this check box to send the mail merge template to select users. Additional options display:  <b>Lookup Users</b> Click this link to search for and select e-Builder users.  <b>Remove Selected Users</b> Select users you want to remove from the list and then click this link to remove them.
<b>Send to Contacts</b>	Select this check box to send process files to e-Builder contacts. Additional options display:  <b>Lookup Contacts</b> Click this link to search for and select e-Builder contacts.  <b>Remove Selected Users</b> Select contacts you want to remove from the list and then click this link to remove them.
<b>Send to External Recipients</b>	Select this check box to send process files to external recipients. Enter recipient email addresses in the box. Enter only one email address per line.
<b>Background Color</b>	Click this button to select a background color for the automation step, which displays in the Designer.
<b>Text Color</b>	Click this button to select a background color text of the automation step, which displays in the Designer.

**Related Topics:**

- [Processes Mail Merge Templates](#)

**1.18.8 Process Custom Fields**

Custom fields are completely configurable and up to the account administrator to define. These fields display on the Process Properties. Custom fields are useful because they can contain additional project process information that is not part of the standard process layout, or information that is used in reports to define or

separate process information.

### Add Process Custom Fields

To add process custom fields:

1. Go to Process Settings. For more information, see [Access Process Settings](#).
2. Click **Custom Fields**.
3. Click **Add Field**.
4. Select a data type, and then click **Next**.
5. On the **Custom Field Details** page, enter a name for the custom field in the space provided after **Field Label**.
6. Click **Next**.
7. Review the details of the custom field.
8. If changes are required, click **Previous** to navigate to the appropriate page and make changes.  
  
Or
9. If details are correct, click **Save**.

#### 1.18.9 Processes Mail Merge Templates

The information below and procedures apply to both process details and process logs mail merge template. The difference between the two is that process details include line items and process logs include only process level data.

Mail merge templates allow you to extract data from e-Builder and export it into a Microsoft Word® or Adobe PDF® document. This eliminates the need to enter information into a Word document manually and reduces the margin for error. In the Processes module, mail merge templates can be created for process details or process logs. Having a system-generated document ensures the integrity of your data and it's a quick and easy way to consolidate information you've already entered once, in a ready-to-read format.

Below is a list of procedures for working with process mail merge templates:

- [Add Mail Merge Templates](#)
  - [Edit Mail Merge Templates](#)
-

## Add Mail Merge Templates

**Tip:** It is recommended that you download the default Mail Merge Template to start with. Although this template can be modified, the default is complete with all necessary field mappings. Having a template on file also gives you the ability to make necessary changes as they arise, without having to start over from scratch.

1. Go to process settings. For more information, see [Access Process Settings](#).
2. Expand **Mail Merge Templates**.
3. Click **Process Details** or **Process Logs**. The Mail Merge Template page displays.
4. Click the **Download Default Mail Merge Template** link.
5. Save this document locally.
6. On the Mail Merge Templates page, click **Add New Template**.
7. Complete all required fields:
  - Template Name
  - Make template Active (available for use) or Draft
  - Set output type (Word or PDF)
  - Select the process to apply the template to
8. Click **Browse** to search for and upload the default template saved in step 5.
9. In the **Project Assignments** section, select the project(s) that you'd like to assign the template to.
10. Click **Add**. The selected project(s) is added to the box on the right.

**Note:** If you do not specify the project(s) that will use this template, the template will be available in all projects.

11. Click **Save**.

## Edit Mail Merge Templates

To edit mail merge templates:

1. Go to Process Settings. For more information, see [Access Process Settings](#).
2. Expand **Mail Merge Templates**.
3. Click **Process Details** or **Process Logs**. The Mail Merge Template page displays.
4. Click the title of the template.
5. Click **Edit**. The Edit Mail Merge Template page displays.

6. Make any or all of the modifications listed below.

- Change template name
- Add/Remove/Edit template description
- Change status - Make template Active (available for use) or Draft
- Change output type - Export documents to Word or PDF format
- Change template file - Upload a new mail merge template
- Assign template to projects

7. Click **Save**.

## 1.19 Projects

### 1.19.1 Managing Project Settings

#### 1.19.1.1 Access Project Settings

To access project settings:

1. Click the **Setup** link.
2. In the **Administration Tools** section, click **Projects**.

#### 1.19.1.2 About Project Settings

Projects within e-Builder Enterprise™ represent the actual projects of a program. Project settings allow you to create projects, complete the details of each one, and then configure some of the common attributes shared among your projects. Projects are typically set up by an account administrator as the need arise. But keep in mind account administrators are able to delegate this responsibility by giving select users 'Add New Project' permission.

Upon the conclusion of a project, it can be optionally [deleted from the system](#). For some, removing all project data after it's been concluded is a requirement by certain vendors; but it is important to note that this is an irreversible action.

Below is an overview of each project setup option. Although there is no system-enforced order by which to configure these settings, the order displayed below is recommended.

1. [Create Project Custom Fields](#) – Project custom fields provide a means to capture data specified by account administrators. Custom field options vary greatly and are typically created based on your reporting needs.

Please select a project...



2. [Configure Project Settings](#) – These settings allow you to set a default Project Administrator role. Setting this up restricts the options that display to just the users in the specified role. Additionally, you can select a [project number custom field](#) that will display on all pages where the project name appears. Lastly, from here you can define up to three options by which users can search for the project from the static “Project” drop-down menu that appears on every page within e-Builder Enterprise. Most common options include Project Name and Project Number. These options will be the values of select [project custom fields](#).
3. [Verify Project Status Options](#) – By default, the project statuses listed below are available to you, however, you’re able to add your own or delete any of these existing ones, if they are not already in use.
  - Active
  - Administrative
  - Complete
  - Inactive
4. (If applicable) [Add Project Web Links](#) – Web links are URLs to project-related websites that can be added to the project’s details for users to access. Please note that this link will display in the details of all account projects. In some cases, these links are to an internal portal of some sort that has pertinent information to assist project participants.
5. [Create New Projects](#) – It is recommended that projects are created after setup options have been completed, as most of these settings will be applicable when creating new projects. New projects are created as the need arise. Multiple projects can be [imported in bulk](#) or [added one at a time](#). In this step, you will complete project details and apply project templates.

### 1.19.1.3 Access Project List Page

To access the Project List page:

1. Go to Project Settings. For instructions, see [Access Project Settings](#).
2. Click **Manage Projects**.

#### 1.19.1.4 Setting Up New Projects

Creating a new project and completing the details of that project is just one aspect of setting up a new project. After the project is created, you should apply project templates in order to make the project more complete and useable. Project templates allow you to replicate the document structure data from existing projects and apply it to current projects. You can also apply the following templates in order to make the project as comprehensive as possible for project managers and users to start working more quickly:

- Project Template (Document folder structure)
- Role Templates
- Schedule Templates
- Budget Templates
- Cash flow Templates
- Funding Templates

Project Imports is another option for setting up your projects. Imports combine these two steps into one; completing project details and applying templates. Another advantage of projects imports is that multiple projects can be imported in a single import file at a time; saving you value time and effort. While neither imports nor templates are required to set up your projects they are valuable tools that will help you work more efficiently. The following topics will assist you with setting up new projects:

- [About Project Imports](#)
- [Import Projects](#)
- [Add New Projects](#)
- [Apply Project Templates](#)

#### 1.19.1.5 About Project Imports

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Add New Project' Permission*

Multiple projects can be imported at a time. The import is an Excel spreadsheet of project details, which helps you set up projects more quickly. During the import you'll also be able to apply templates from other areas of the e-Builder if available:

- Project Template (Document folder structure)
  - Role Templates
-

- Schedule Templates
- Budget Templates
- Cash flow Templates
- Funding Templates

Applying these additional templates adds value to project templates by reducing the time and effort for project administrators to set up various aspects of the project.

## Setting up the Import File

The image below includes the name of all fields that can be added to the header row of the import file. In addition to the fields below, project custom fields can be added as column headers as well. The below image is also the mapping step that will be encountered when importing projects. If the headers in your import file match these fields exactly, these fields will auto-populate. If the header names are different, you will map the corresponding columns in your spreadsheet to the e-Builder built-in fields in step 2 of the import process. As noted by the red asterisks, only two of these fields are required: Project Name and Project Status. However, the more comprehensive the import file is the more complete project details will be.

Step 2 of 3

**Import Projects - Field Mappings**

**Project Built-In Fields** Previous Next Cancel

<p>* Project Name: <input type="text"/></p> <p>e-Builder Project Administrator: <input type="text"/></p> <p>Address: <input type="text"/></p> <p>State: <input type="text"/></p> <p>Country: <input type="text"/></p> <p>Project Webcam URL: <input type="text"/></p> <p>Allow User Logins?: <input type="text"/></p>	<p>* Project Status: <input type="text"/></p> <p>Description: <input type="text"/></p> <p>City: <input type="text"/></p> <p>Zip: <input type="text"/></p> <p>Start Date: <input type="text"/></p> <p>Target Date: <input type="text"/></p> <p>Deny Techsupport Access?: <input type="text"/></p>
---	--


**Workflow Settings Built-In Fields**

Estimated Submittals: <input type="text"/>	Workflow Due Date Offset: <input type="text"/>
--	--

## Description of Built-in Fields and Acceptable Values

Below is a description of the built-in fields/column headers of the import file and a description of the values that should be entered for each one in the Excel Import file.

Field Name	Description
------------	-------------

<b>Project Name</b>	This is a required field. Enter the name of the project(s) in this column of the spreadsheet. Text and numerical characters are acceptable.
<b>e-Builder Project Administrator</b>	Enter the name of the project's administrator in this column of the spreadsheet.   <b>Note:</b> If a default admin role is selected in the <a href="#">Project Settings</a> , and a user's name that is not a member of this role is added to the import file as a project administrator, an exception will occur and this person will not be accepted as a project administrator. Therefore, if you receive an exception message due to this field, check the project settings to ensure you are including the name of users who are members of the selected default project administrator role.
<b>Address</b>	Enter the address of the project site.
<b>City</b>	Enter the city of the project site.
<b>State</b>	Enter the State of the project site. Acceptable values include State abbreviations and full state names.
<b>Zip</b>	Enter the zip code of the project site.
<b>Country</b>	Enter the country of the project site. Acceptable values include Country abbreviations and full country names.
<b>Project Webcam URL</b>	Enter the URL of the webcam or project-related website.
<b>Allow User Logins?</b>	Indicate whether or not users are allowed to access this project. This setting can later be changed by going to the Project List page and editing the details of the project. Acceptable values are 'Yes' and 'No.'  For instructions, see <a href="#">Edit Project Details</a> .
<b>Project Status</b>	Enter the status of the project. There are default statuses available, but project statuses can also be customized. For more information, see About Project Statuses.
<b>Description</b>	Enter a description of the project.



<b>Start Date</b>	Enter the date that the project is scheduled to start.
<b>Target Date</b>	Enter the date that the project is slated to be complete.
<b>Deny Tech Support Access?</b>	Indicate whether or not tech support should not be able to access this project. are 'Yes' and 'No.'
<b>Workflow Due Date Offset</b>	Enter the number of days to default the date due on forms.

### 1.19.1.6 Import Projects

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Add New Project' Permission*

Multiple projects can be imported at a time. The import is an Excel spreadsheet of project details, which helps you set up projects more quickly. During the import you'll also be able to apply templates from other areas of the e-Builder if available:

- Project Template (Document folder structure)
- Role Templates
- Schedule Templates
- Budget Templates
- Cash flow Templates
- Funding Templates

Applying these additional templates adds value to project templates by reducing the time and effort for project administrators to set up various aspects of the project. For more about setting up your import file, see [About Project Imports](#).

To import projects:

1. Go to the My Settings section in the Setup module. For instructions, see [Access My Settings](#).
2. Click **Membership**, and then click **Projects**. The Membership page displays.
3. Click **Import**. The Import Projects page displays.
4. Complete all necessary fields.
5. Click **Next**.

6. If necessary, map the e-Builder built-in fields to the corresponding fields in the import file.
7. Click **Next**.
8. Click **Save**.

Related Topics:

- [About Project Imports](#)
- [Add/Edit Projects Page Overview](#)

### 1.19.1.7 Add New Projects

e-Builder Projects represent the actual projects of a program and can be added at any time via [project import](#) or individually, as outlined in the procedure below.

To add projects:

1. Go to the My Settings section in the Setup module. For instructions, see [Access My Settings](#).
2. Click **Membership**, and then click **Projects**. The Membership page displays.
3. Click **Add Project**. The Add Project page displays.
4. Complete all necessary fields.
5. Click **Save**.

Related Topics:

- [Setting Up New Projects](#)
- [Apply Project Templates](#)
- [Add/Edit Projects Page Overview](#)

### 1.19.1.8 Apply Project Templates

Project templates are a great time-saving tool that helps you get new and existing projects underway quickly when there are changes to user roles or project memberships.

To apply a project template:

1. Go to the Project List page. For instructions, see [Access Project List Page](#).
  2. Select the check box next to the project(s) you want to apply a template to.
-

3. Click **Apply Template**. The Apply Templates to [Project Name] page displays.
4. Complete all necessary fields.
5. Click **Apply Templates**.

Related Topics:

- [Add/Edit Projects Page Overview](#)

### 1.19.1.9 Complete Project Settings

Project settings allow you to do three things in particular: assign a default project administrator role, choose a project number custom field and define project search options. A description of each setting is located below.

1. **Assign Default Project Administrator Role:** Setting a default role from which to choose a project administrator will automatically populate the users in the select role when assigning an administrator on a new project. If not configured, all account users will be available for selection.
2. **Choose Project Number Custom Field:** This allows you to take a project custom field to use as a project number to be displayed on all pages where the project name appears. For instructions, see [Create Project Number Custom Fields](#).
3. **Define Project Search Options:** This setting allows you to choose up to three options by which users can search for the project from the static “Project” drop-down menu that appears on every page within e-Builder Enterprise. Most common options include Project Name and Project Number.



To complete project settings:

1. Go to Project Settings. For instructions, see [Access Project Settings](#).
2. Click **Project Settings**. The Project Settings page displays.
3. Complete all necessary fields.

4. Click **Save**.

Related Topics:

- [Project Settings Page Overview](#)
- [Create Project Number Custom Field](#)

#### 1.19.1.10 Create Project Number Custom Field

Project numbers are unique project identifier that will appear on all pages that the project name exists. Project numbers are simply Project custom fields. They are created in the same manner as any Project custom field, except they must meet the following two specifications: 1) be a String field and 2) be a required field.

To add Project number custom fields:

1. Go to Project settings. For instructions, see [Access Project Settings](#).
2. Click **Custom Fields**.
3. Click **Add Field**. The Add Custom Field page displays.
4. Select the **String** radio button, and then click **Next**.
5. Complete all necessary fields; specifically, the following:
  - Enter a name for the custom field in the space provided after **Field Label**.
  - Select the **Required** check box.
  - Optionally, select the **Do not allow duplicates** check box to make the value of this field unique. This will ensure that another Project custom field does not have the same value.
6. Click **Next**.
7. Review the details of the custom field.
8. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

Or

If details are correct, click **Save**.

---

### 1.19.1.11 Add Project Custom Fields

Custom fields allow you to gather additional information that may not be covered in the project details, such as project numbers and project type. This data is used for reporting purposes. Although you can add project custom fields in Project Settings, it is recommended that custom fields are added through Global Custom Fields, which will allow you to add custom fields to any e-Builder module or object. For more information on custom fields, see [About Global Custom Fields](#).

To add Project custom fields:

1. Go to Project settings. For instructions, see [Access Project Settings](#).
2. Click **Custom Fields**.
3. Click **Add Field**.
4. Select a data type, and then click **Next**. The **Custom Field Details** page displays.
5. Complete all necessary fields.
6. Click **Next**.
7. Review the details of the custom field.
8. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

Or

If details are correct, click **Save**.

Related Topics:

- [Add/Edit Custom Field Page Overview](#)
- [Create Project Number Custom Field](#)

### 1.19.1.12 Add Project Web Links

Web links are created to give project participants access to websites pertinent to the project. As many URLs can be added as necessary and then permissions set appropriately for each one. Some websites may be necessary for all project participants to access and others might need to be restricted to certain roles or just the administrator. These links will be accessible from the Project Details page.

To add new project web links:

1. Go to Project Settings. For instructions, see [Access Project Settings](#).
2. Click **Web Links**. The Project Web Links page displays.
3. Click **Add Link**.
4. Complete all necessary fields.
5. To save this link and add another, click **Save & Add**.

Or

To complete this task, click **Save**.

Related Topics:

- [Project Web Links Page Overview](#)

#### 1.19.1.13 Edit Project Details

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Update Project Details' Permission*

Project details can be modified throughout the life of the project and are necessary when key project information changes, such as project status, start and target dates, project administrators, custom fields and various other settings. For a list of all editable settings, see [Add/Edit Project Page Overview](#).

To edit projects:

1. Go to the Project List page. For instructions, see [Access Project List Page](#).
2. Click the **Edit** link next to the project you want to edit. The Edit Project Details page displays.
3. Make all necessary changes.
4. Click **Save**.

Related Topics:

- [Add/Edit Projects Page Overview](#)
-

#### 1.19.1.14 Delete Projects

Deleting projects permanently removes all project data. This may be necessary for projects that have expired and may even be required by certain vendors. Before a project is deleted, you will be required to enter your e-Builder password. A request is then submitted to e-Builder Support for execution. Once deleted, the project cannot be recovered. Details of the deletion can be viewed by running an Audit Log Report.

To delete a project:

1. Go to the Project Settings. For instructions, see [Access Project Settings](#).
2. Click **Manage Projects**.
3. Click the **Delete** link next to the project name you want to delete. A Confirm Deletion Message displays.
4. Enter a note for this deletion.
5. Enter your e-Builder password to confirm this deletion.
6. Click **Yes, Delete**.

#### 1.19.1.15 About Project Statuses

Project statuses allow you to place your own labels on your projects in order to inform project participants of a project's standing. Statuses have no bearing on whether or not members can access the project; there are project settings and permissions that allow you to determine project access. Statuses simply inform users of the current state of the project.

By default, the project statuses listed below are available on every account. However, this list can be customized to include only those that are applicable to your organization. You have the option to add, edit or remove project statuses if they are not in use. Default options are as follows:

- Active
- Administrative
- Complete
- Inactive

The following will tasks will help you manage project statuses:

- [Add New Project Statuses](#)
  - [Edit Existing Project Statuses](#)
-

- [Delete Project Statuses](#)

#### 1.19.1.16 Add New Project Statuses

Project statuses allow you to place your own labels on your projects in order to inform project participants of a project's standing. Statuses have no bearing on whether or not members can access the project; there are project settings and permissions that allow you to determine project access. Statuses simply inform users of the current state of the project. There are default project statuses available, but you can add additional ones or remove any that may not be applicable.

To add new project statuses:

1. Go to Project Settings. For instructions, see [Access Project Settings](#).
2. Click **Project Status Options**. The Manage Project Status Options page displays.
3. Enter the new status in the **Status** field.
4. Enter a description of the status in the **Description** field.
5. Click **Save**.

Related Topics:

- [About Project Statuses](#)
- [Edit Existing Project Statuses](#)
- [Delete Project Statuses](#)

#### 1.19.1.17 Edit Existing Project Statuses

Project statuses allow you to place your own labels on your projects in order to inform project participants of a project's standing. Statuses have no bearing on whether or not members can access the project; there are project settings and permissions that allow you to determine project access. Statuses simply inform users of the current state of the project. The name and description of project statuses can be changed at any time.

To edit project statuses:

1. Go to Project Settings. For instructions, see [Access Project Settings](#).
  2. Click **Project Status Options**. The Manage Project Status Options page displays.
  3. Enter the new status in the **Status** field.
-



4. Enter a description of the status in the **Description** field.
5. Click **Save**.

Related Topics:

- [About Project Statuses](#)
- [Add New Project Statuses](#)
- [Delete Project Statuses](#)

### 1.19.1.18 Delete Project Statuses

Project statuses allow you to place your own labels on your projects in order to inform project participants of a project's standing. Statuses have no bearing on whether or not members can access the project; there are project settings and permissions that allow you to determine project access. Statuses simply inform users of the current state of the project. There are default project statuses available, but you can add additional ones or remove any that may not be applicable, as long as they are not currently being used.

To delete project statuses:

1. Go to Project Settings. For instructions, see [Access Project Settings](#).
2. Click **Project Status Options**. The Manage Project Status Options page displays.
3. Click the **Delete** link next to the status you want to remove. You are prompted to confirm.
4. Click **Continue**.

Related Topics:

- [About Project Statuses](#)
- [Add New Project Statuses](#)
- [Edit Existing Project Statuses](#)

## 1.19.2 Project Settings Page Overviews

### 1.19.2.1 Project List Page Overview

This page allows account administrators to view a list of available projects and take the following actions:

- [Add Projects](#)
-

- [Apply Project Templates](#)
- [Import Projects](#)

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Filter Submittal Items</b>	
The Project List filter allows you to narrow down the results list to just the projects you need to view. This filter can be collapsed to increase screen real estate, and then expanded if necessary, by clicking the expand/collapse button in the upper-left corner of the page.	
<b>Project Name</b>	Enter the name of the project to filter for a particular project.
<b>City</b>	Enter the name of the city associated with the project(s) you want to filter by.
<b>Custom Field 1</b>	If applicable, click this drop-down arrow or enter a project custom field to filter by projects that are associated with a particular custom field.  For more information, see <a href="#">Add Project Custom Fields</a> .
<b>Only Show Projects Allowing User Logins</b>	Select this check box to include only those projects that allow users to log in.
<b>Project Administrator</b>	Click this drop-down arrow to filter for projects that are managed by a specific project administrator.
<b>State</b>	Enter the name of a state to filter for projects located in a particular state.
<b>Custom Field 2</b>	If applicable, click this drop-down arrow or enter a project custom field to filter by projects that are associated with a particular custom field.  For more information about project custom fields, see <a href="#">Add Project Custom Fields</a> .

<b>Filter</b>	Click to filter for entered criteria.
<b>Clear Filter</b>	Click to clear the filter.
<b>Projects Results Table</b>	
<b>Add Project</b>	Click to add a project.
<b>Apply Template</b>	Click to apply a project template. Project templates are a great time-saving tool that helps you get new and existing projects underway quickly when there are changes to user roles or project memberships.
<b>Import</b>	<p>Click to import a project template. Project templates allow you to complete project details through the import of an Excel spreadsheet, which will later be used by project administrators to get their projects set up more quickly. During the import you'll also be able to apply the templates listed below, if available. Applying these additional templates adds value to project templates by reducing the time and effort for project administrators to set up various modules within the project.</p> <ul style="list-style-type: none"> <li>• Project Template (Document folder structure)</li> <li>• Role Template</li> <li>• Schedule Template</li> <li>• Budget Template</li> <li>• Cash Flow Template</li> <li>• Funding Template</li> </ul> <p>For more information see <a href="#">About Project Imports</a>.</p>
<b>Edit</b>	Click to edit the details and/or settings of the corresponding project.
<b>Delete</b>	Click to delete the project. Deleting projects permanently removes all project data. This may be necessary for projects that have expired and may even be required by certain vendors. Before a project is deleted, you will be required to enter your e-Builder password. A request is then submitted to e-Builder Support for execution. Once deleted, the project cannot be recovered. Details of the deletion can be


	viewed by running an Audit Log Report.
<b>Name</b>	Displays the project name.
<b>Project Administrator</b>	Displays the name of the administrator on the project.
<b>User Logins Allowed</b>	A check mark in this column indicates that users are able to log in to this project.

### 1.19.2.2 Project Settings Page Overview

Project settings apply to three configurable areas of the project:

- The default project administrator role
- Project number custom fields
- Project search columns

The table below provides detailed descriptions of the fields and buttons located on this page.

Field	Description
<b>Default Project Admin Role</b>	<p>Choosing a role from this drop down list helps you limit optional project administrators to a single role, as opposed to selecting from a list of all account users.</p> <p>For information on modifying user roles, see <a href="#">Account Role Management</a>.</p>
<b>Project Number Custom Field</b>	<p>Click this drop down menu to select a project number custom field. This custom field will display wherever the project name displays in the system. Project numbers offer an additional way for users to identify the project should your organization use other project classifications.</p> <p> <b>Note:</b> Project number custom fields must be configured as string type fields in order to display in this drop-down arrow.</p> <p>For steps on creating project custom fields, see <a href="#">Manage Custom Fields</a>.</p>


<b>Project Search Columns</b>	<p>This setting allows you to define up to three options by which users can search for the project from the static “Project” drop-down menu that appears on every page within e-Builder Enterprise. Most common options include Project Name and Project Number.</p> <div data-bbox="584 434 1385 474" style="border: 1px solid gray; padding: 2px;">Please select a project... ▼</div> <p>Project Name appears by default and it is the only required column.</p> <p>Fields that display in the Available Fields box comprise of all <a href="#">global custom fields</a> and project-specific custom fields.</p>
<b>Save</b>	Click to save changes.
<b>Cancel</b>	Click to cancel any changes. Unsaved settings will be lost.

### 1.19.2.3 Add/Edit Projects Page Overview

This page allows administrators to add or make changes to the details of an existing project. Project settings can also be modified from this page.

Field	Description
<b>Check Spelling</b>	Click to check the spelling of form field entries.
<b>Save</b>	Click to save changes.
<b>Cancel</b>	Click to discard changes.
<b>Project Name</b>	Enter the project name.
<b>e-Builder Project Administrator</b>	<p>If the project setting is configured to default to a specific project role, only users in that role display for you to choose from. Otherwise, select a person from the list of account users.</p> <p>See <a href="#">Complete Project Settings</a> for more information.</p>

<b>Description</b>	Enter a description of this project. This can be used to give project administrators and members of the project additional information about the project.
<b>Project Status</b>	Choose a project status from this drop-down menu. Default statuses are available, but the list of statuses may be customized by account administrators. For more on this setting, see <a href="#">Managing Project Statuses</a> .
<b>Project Photo</b>	Click <b>Browse</b> to select a picture of this project.
<b>Address</b>	Enter the address of the project site. This information will be available from the Project Details page.
<b>City</b>	Enter the city of the project site.
<b>State / Province</b>	Enter the state of the project site.
<b>Zip / Postal Code</b>	Enter the zip code of the project site.
<b>Country</b>	Enter the country of the project site.
<b>Start Date</b>	Enter the date that the project will begin.
<b>Target Date</b>	Enter the date that the project is scheduled to end.
<b>Project Webcam</b>	If available, enter the URL of the webcam at the project site.
<b>Custom Fields Tab</b>	
If there are project custom fields available, they display on this tab. Custom fields allow you to group or filter information according to specific business processes in your reports. For more information, see <a href="#">About Global Custom Fields</a> .	
<b>Settings Tab</b>	
<b>Project Settings</b>	
<b>Allow User Logins?</b>	<b>Yes</b> - This is the default selection. Select this option to

	<p>allow users to log in to this project.</p> <p><b>No</b> - Select this option to restrict users from logging into this project. If a project is still being set up, administrators may choose to temporarily restrict access.</p>
<b>Deny Techsupport Access?</b>	<p><b>Yes</b> - Select this option to disallow e-Builder technical support from accessing this project. Tech Support access may be necessary for troubleshooting issues users might experience. However, projects that include confidential content may need to be restricted.</p> <p><b>No</b> - This is the default selection. Select this option to allow e-Builder technical support to access this project whenever necessary. Tech support might need access to assist users when troubleshooting issues that might arise.</p>
<b>Enable Document Control?</b>	<p>Document control makes document custom fields available on a project. Even if document custom fields exist, unless this setting is enabled, users will not be able to complete these fields on a project.</p> <p> <b>Note:</b> When the Plan Room is being used with at least one bid package, document control cannot be disabled because document custom fields are required when using the Plan Room.</p> <p><b>Yes</b> - Select enable document control. Users will be able to complete document custom fields.</p> <p><b>No</b> - Select to disable document control. Document custom fields will not be visible to users.</p>
<b>Equipment Management Tool Integration?</b>	<p><b>Yes</b> - Select to enable equipment management integration on this project. This setting will restrict the <a href="#">Equipment Manager</a> feature so that all updates to the equipment list can only be done outside of e-Builder. This feature would be used strictly for budgeting and viewing the equipment list and the status of equipment items. When this setting is enabled, the equipment list cannot be compiled or</p>

	<p>managed in e-Builder, but items can still be tied to the budget.</p> <p><b>No</b> - This is the default selection. Select to maintain full use of the <a href="#">Equipment Management</a> feature.</p>
<p><b>Plan Room Access</b></p>	<p>This setting allows you to determine how the plan room will be accessed. For more information, see <a href="#">About the Plan Room</a>.</p> <ul style="list-style-type: none"> <li>• <b>None</b> - This is the default selection. Select to restrict all access to the plan room.</li> <li>• <b>Internal Only</b> - Select to limit plan room access only to those users who can access e-Builder. If this option is selected, users will only be able to access the plan room through e-Builder; a URL will not be generated.</li> <li>• <b>Public</b> - Select to automatically generate a URL from which users can access the plan room. After changes are saved, this URL displays in the External Plan Room URL field located on the Project Details page.</li> <li>• <b>Shared Password</b> - Select to create a shared password for users to enter when accessing the plan room.             <ol style="list-style-type: none"> <li>1. Enter a password in the <b>Shared Password</b> field.</li> <li>2. Re-enter this password in the <b>Confirm Password</b> field.</li> </ol> </li> </ul>
<p><b>Workflow Settings</b></p>	
<p><b>Workflow Due Date Offset</b></p>	<p>Enter the number of days that the workflow forms are due after it has been initiated. For example, if workflow forms should be submitted, within seven days of being received, enter "7" in this field.</p>
<p><b>Project Calendar</b></p> <p>This setting allows you to configure calendar settings, which will influence the</p>	



project calendar and schedule.	
<b>Work Day Start Time</b>	Enter the time that the work day will begin for this project.
<b>Work Day End Time</b>	Enter the time that the work day will end for this project.
<b>Work Week</b>	Choose the days of the week that will make up the work week for this project.
<b>Calendar Exceptions</b>	
This section allows you to determine the days that will be treated as an exception to the general rule, such as holidays that fall on typical working days. From this page you can choose particular dates and mark them as working or non-working days. Identifying these days at the onset of a project helps managers plan more effectively.	
<b>Date</b>	Enter a date to add as an exception or click the calendar icon to choose one directly from the calendar. In the adjacent box, choose whether this is a working or non-working day.
<b>Add</b>	Click to add the entered date exception to the list of calendar exceptions.
<b>Delete</b>	Click to delete the selected calendar exception date.

#### 1.19.2.4 Manage Project Status Options Page Overview

Project statuses allow you to place your own labels on your projects in order to inform project participants of a project's standing. Statuses have no bearing on whether or not members can access the project; there are project settings and permissions that allow you to determine project access. Statuses simply inform users of the current state of the project. This page allows administrators to manage these statuses.

By default, the project statuses listed below are available on every account. However, this list can be customized to include only those that are applicable to your organization. You have the option to add, edit or remove project statuses. Default options are as follows:

- Active
- Administrative
- Complete
- Inactive

The following will tasks can be completed from this page:

- [Add New Project Statuses](#)
- [Edit Existing Project Statuses](#)
- [Delete Project Statuses](#)

Field	Description
Save	Click to save changes.
Cancel	Click to discard changes.
Status	Enter the name of the new status in this field.
Description	Enter a description for this status option.
Delete (Button)	Click to delete selected statuses.
Edit (Link)	Click to make in-line changes to the corresponding status.
Delete (Link)	Click to delete the corresponding status.
Status	This column lists all available project statuses.
Description	Displays a description of the project status.

#### 1.19.2.5 Project Web Links Page Overview

This page lists all available project web links. Web links are created to give project participants access to websites pertinent to the project. As many URL's can be added as necessary and then permissions set appropriately for each one. Some websites may be necessary for all project participants to access and others might need to be restricted to certain roles or just the administrator. These links will be accessible from the Project Details page. From this page, administrators are able to [add project web links](#).

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Add Link</b>	Click to add a new web link.
<b>Edit</b>	Click to make changes to the details of the project URL.
<b>Delete</b>	Click to delete the corresponding URL.
<b>Name of Link</b>	Displays the name of the web link.
<b>URL</b>	Displays the web address.
<b>Link Permissions</b>	<p>Displays the permission level of this URL. Options include the following:</p> <ul style="list-style-type: none"> <li>• <b>All</b> - This is the default selection. Select to allow everyone with project access to access this URL.</li> <li>• <b>Administrator Only</b> - Select to limit access to this web cam to the project administrator only. The project admin can be specified from the <a href="#">Add/Edit Project page</a>.</li> <li>• <b>Selected Roles</b> - Select to choose specific role that are able to access this URL</li> </ul>
<b>Last Modified By</b>	Displays the name of the user who last modified the web link or its details.

#### 1.19.2.6 Add/Edit Project Web Links Page Overview

This page allows you to add project web links or make changes to the details of an existing web link. Web links are created to give project participants access to websites pertinent to the project. These links will be accessible from the Project Details page. As many URLs can be added as necessary and then permissions set appropriately for each one. Some websites may be necessary for all project participants to access and others might need to be restricted to certain roles or just the administrator. Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Save</b>	Click to save changes.
<b>Save &amp; Add</b>	Click to save changes and add an additional web link.
<b>Cancel</b>	Click to discard changes.
<b>Name of Link</b>	Enter the name of the web link.
<b>URL (Link)</b>	Enter the web address.
<b>Pop-up Window Height</b>	By default, the height of the window that displays the contents of the website is 640 pixels, but you can change it to meet your preference.
<b>Pop-up Window Width</b>	By default, the width of the window that displays the contents of the web cam is 740 pixels, but you can change it to meet your preference.
<b>Link Permissions</b>	<p>Determine the permission level for accessing this website from the following options:</p> <ul style="list-style-type: none"> <li>• <b>All</b> - This is the default selection. Select to allow everyone with project access to access this URL.</li> <li>• <b>Administrator Only</b> - Select to limit access to this web cam to the project administrator only. The project admin can be specified from the <a href="#">Add/Edit Project page</a>.</li> <li>• <b>Selected Roles</b> - Select to choose specific role that are able to access this URL</li> </ul>

### 1.19.2.7 Import Projects Page Overview

The Import Projects page allows administrators to import multiple projects into e-Builder through a single import. During the import, you also have the option to apply any of the available templates listed below:

- Project Templates (Document folder structure)
- Role Templates
- Schedule Templates
- Budget Templates

- Cash Flow Templates
- Funding Templates

Applying these templates help you and project administrators to set up projects more quickly. Certain projects may share similar characteristics which makes a particular template appropriate for multiple projects. For example, public school projects might have the same project managers, administrators, facilities managers, and finance directors, which would allow you to reuse the same template(s) for all projects of this nature.

**Tip:** if you wish to apply different templates to the projects in the export, then only include like projects that you want to apply the same templates to in each file. For a list of fields that can be added to the import file, see [About Project Imports](#). For instructions on completing the import, see [Import Projects](#).

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Next</b>	Click to move to the next step of the import wizard after all necessary fields have been completed.
<b>Cancel</b>	Click to discard changes.
<b>Select a project template</b>	<p>Projects selected from this menu will be used as a template for your selected project. After choosing a project, you'll have the option to copy all or some of the following sets of information:</p> <ul style="list-style-type: none"> <li>• List of users</li> <li>• Project groups</li> <li>• The Documents folder structure including documents, permission settings, folder subscriptions and custom fields</li> <li>• Calendar setting exceptions</li> </ul>
<b>Select a role template</b>	Click the drop-down arrow to select a role template. The content of each template may differ, but Role templates typically include a list of roles and users that belong to each role.
<b>Select a schedule</b>	Click the drop-down arrow to select a schedule

<p><b>template</b></p>	<p>template. The content of each template may differ, but schedule templates can include the following:</p> <ul style="list-style-type: none"> <li>• List of tasks</li> <li>• Duration of each task</li> <li>• Task predecessors</li> <li>• Task resource role</li> <li>• Manager role</li> <li>• Whether or not approval is required for changes to task dates</li> <li>• Whether or not approval is required before a task can be marked complete</li> <li>• List of master tasks and master processes</li> </ul> <p>For more information, see <a href="#">About Schedule Template Import Fields</a>.</p>
<p><b>Select a budget template</b></p>	<p>Click the drop-down arrow to select a budget template. The content of each template may differ, but budget templates can include the following:</p> <ul style="list-style-type: none"> <li>• Budget line items</li> <li>• Account codes</li> <li>• Formulas</li> <li>• Whether or not charges are allowed</li> <li>• Whether or not approval is required for budget changes</li> </ul> <p>For more information, see <a href="#">Working with Budget Templates</a>.</p>
<p><b>Select a cash flow template</b></p>	<p>Click the drop-down arrow to select a cash flow template. The content of each template may differ, but cash flow templates are based on selected budget template line items, they may also be linked to schedule templates.</p> <p>For more information, see <a href="#">Working with Cash Flow Templates</a>.</p>
<p><b>Select a funding template</b></p>	<p>This option will only be available if <a href="#">advanced funding is enabled</a> on the account. Click the drop-down arrow to select a funding template. These templates include</p>

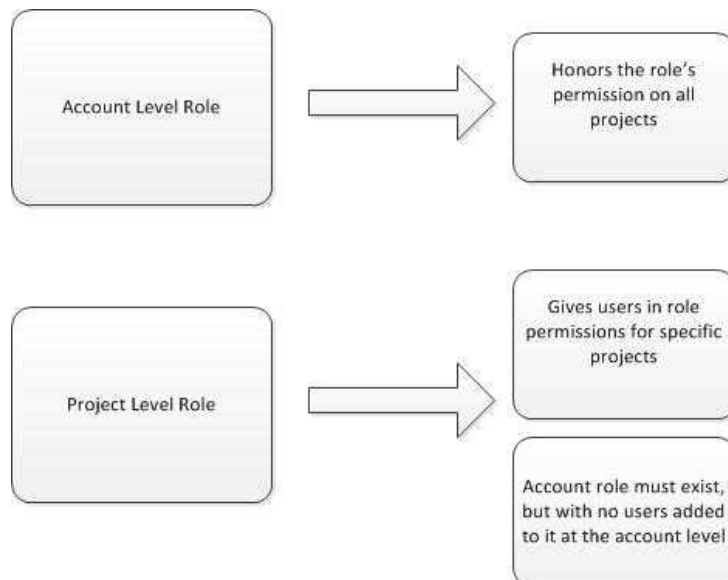
	<p>a list of funding sources.</p> <p>For more information, see <a href="#">Working with Funding Templates</a>.</p>
<b>Import File</b>	Click <b>Browse</b> to search for and select the project import file.

## 1.20 Project Level Roles

### 1.20.1 About Project Level Roles

The Project Level Roles feature gives e-Builder account administrators the ability to place users in project-specific roles. This makes it possible for a user to be in a role on Project A while being in a different role on Project B. Project roles are dependent on the existence of an account role. Therefore, account roles must exist for every single role used on the account. However, to apply roles to the project level simply do not add users to these roles at the account level, because permissions of the account role will always take precedence.

If users are placed in an account role, they will have the permissions associated with that role across all projects. If they are placed in a project role, they will have permissions for that project only.



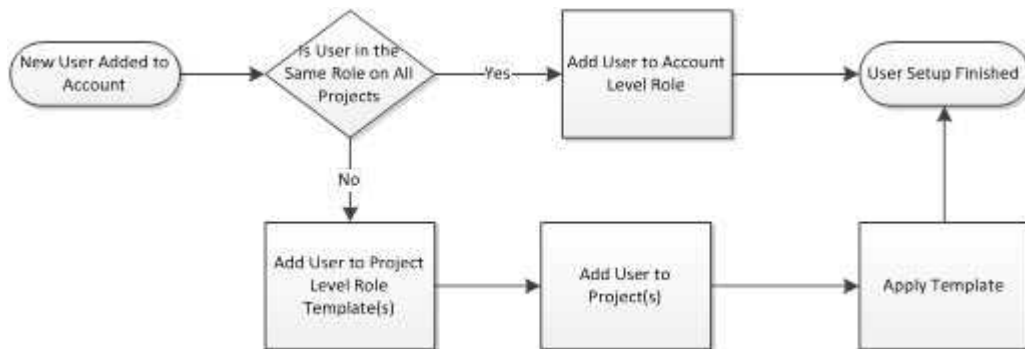
The following tasks will help you set up and use project level roles:

- [Add New Users to Project Roles](#)
- [Transition Existing Users from Account to Project Roles](#)
- [Working with Project Role Templates](#)

## 1.20.2 Managing Project Level Roles


### 1.20.2.1 Add New Users to Project Roles

The flowchart below illustrates the overall process for adding a new user to project roles.



Three main tasks have to be completed in order to add new users to the account and assign them to a project level role. The procedure below instructs you on how to complete all three tasks in a single session:

1. Add User to Account
2. Grant User Project Membership
3. Add User to Project Role

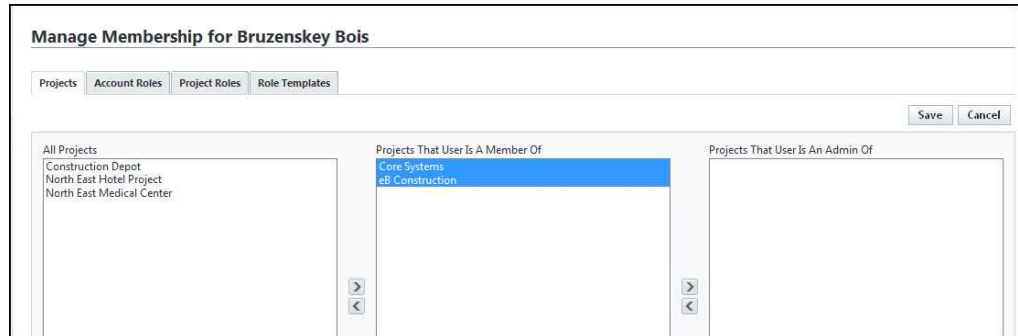
 **Note:** This procedure assumes that the role already exists. For instructions on creating account roles, see [Add New Account Roles](#).

To add new members on the account and grant them project level role access:

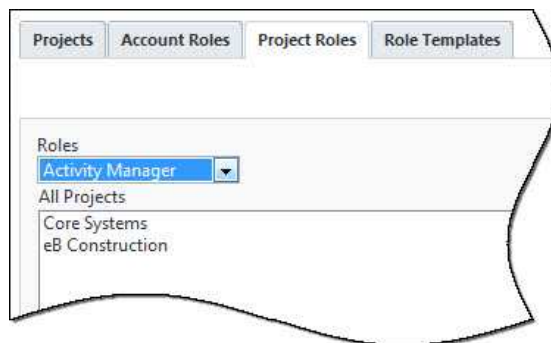
1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
2. Click **Manage Users**.
3. Click **Add New User**.
4. Complete all necessary fields.
5. Click **Save**. The Manage Users page displays.



- Click the name of the user you just added.
- Click **Manager Membership**. The Projects tab is selected.
- Select the project(s) you want this user to be a member of and click the right arrow to add them to the 'Projects that user is a Member of' box.



- Click the **Project Roles** tab.
- In the **Roles** drop-down menu, select the project role you want to add the user to.



- In the 'All Projects' box, select the project(s) you want this user to be in this role for, and then click the right arrow to add them to the 'Selected Projects' box.
- Click **Save**.

Related Topics:

- [Working with Project Role Templates](#)

### 1.20.2.2 Transition Existing Users from Account to Project Roles

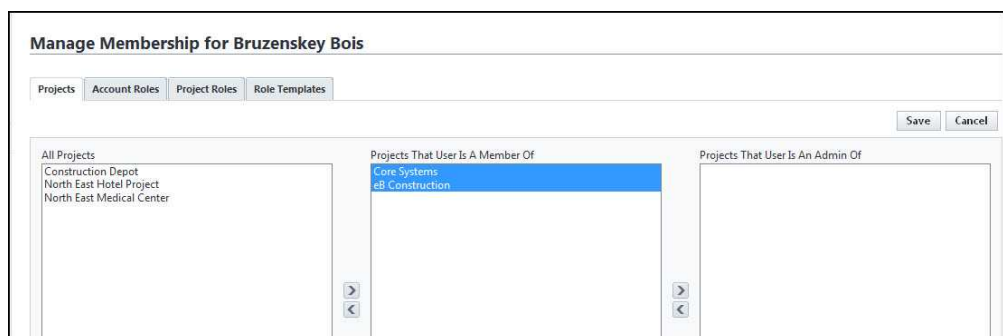
**Note:** If you have never used project level roles before, but already have account roles set up, it is important to note that your account will function in the same way as it always has. After transitioning account roles to project roles, the permissions and notifications that are set up for Documents, Forms, Process, Schedule, Submittals and all related areas will automatically apply to the project role after it is created. No additional action is required from you to sustain your current configurations.

Transitioning a user from the account level to the project level is a three-step process.

1. Ensure that the user is a member of the projects you want to add project level roles for. If they are not, add them to the project(s).
2. Add the user to the project role.
3. Remove the user from the account role.

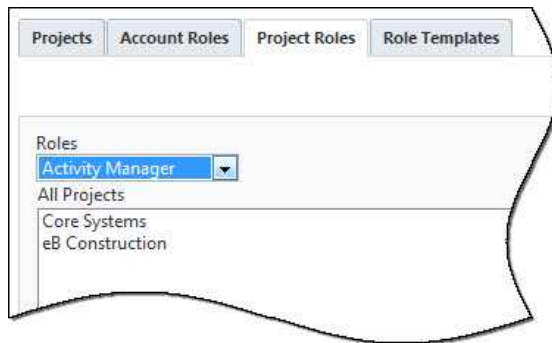
All of these tasks can be completed from the Manage Membership page. Instructions are provided below.

1. Go to the Users Settings. For Instructions see, [Access Users Settings](#).
2. Click **Manage Users**.
3. Click the name of the user.
4. Click **Manage Membership**. The Projects tab is selected and the middle column lists all the projects that the user is a member of.

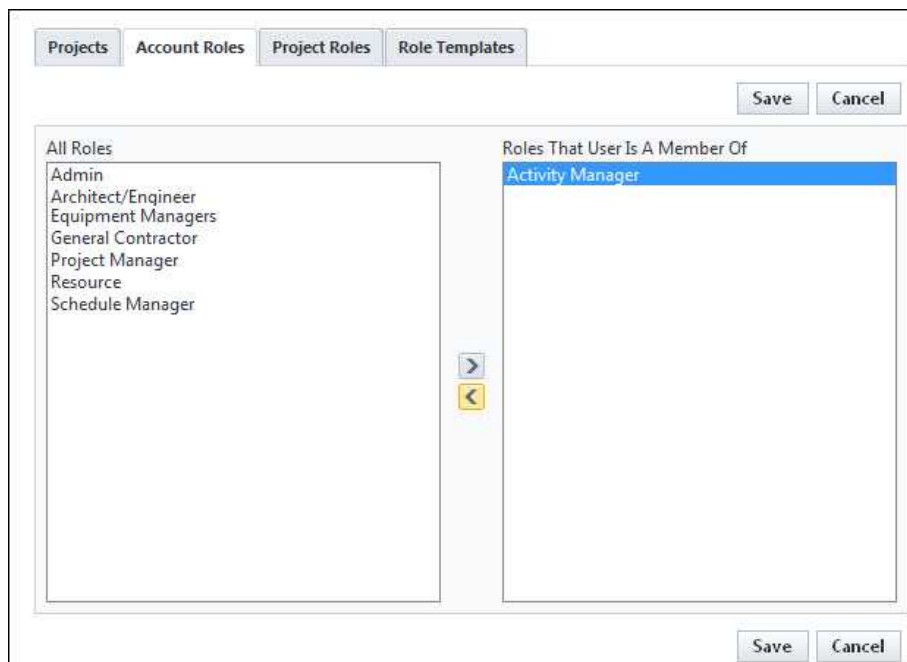


5. Ensure that the user is a member of the projects you want to add project level roles for. If they are not, add them by selecting the project(s) and clicking the right arrow to add them to the 'Projects that user is a Member of' box.

- Click the **Project Roles** tab.
- In the **Roles** drop-down menu, select the project role you want to add the user to.



- In the 'All Projects' box, select the project(s) you want this user to be in this role for, and then click the right arrow to add them to the 'Selected Projects' box.
- Click the **Account Roles** tab.
- Select the role to be removed from the account level, and then click the left arrow to move it to the 'All Roles' box.



- Click **Save**.

Related Topics:

- [About Project Level Roles](#)
- [View User Role Associations](#)

### 1.20.2.3 Working with Project Role Templates

Project Role Templates give account administrators a way to predefine the roles that will be applied to specific project types. For example, Jane Doe may be the lead on all Campus projects, but John Doe is the lead on all Medical Center projects. Using project level role templates is a quick and easy way to apply project roles across your different project types.

The tasks listed below will help you with working with project role templates.

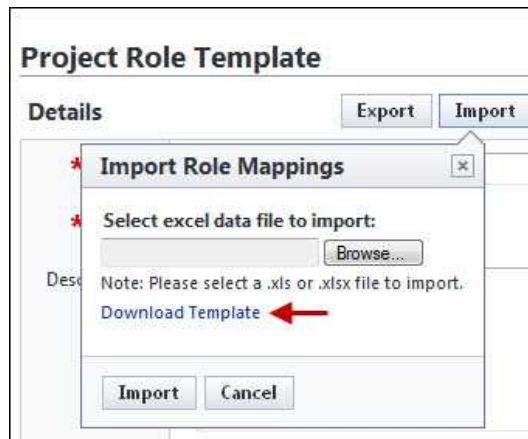
- [Download Project Role Template](#)
- [Import Project Role Templates](#)
- [Apply Project Role Templates](#)
- [Create Project Role Templates within e-Builder](#)
- [Edit Project Role Templates](#)
- [Export/Print Project Role Templates](#)

#### 1.20.2.3.1 Download Project Role Template

This is a preliminary step for importing project role templates. The template is an Excel® spreadsheet with two columns: Role Name and User Name. Fill in the columns for each respective project, save the file and then import it for use on the project. See [Import Project Templates](#) for instructions on the next step.

To download project role templates:

1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
  2. Click **Project Role Templates**.
  3. Click **Add**.
  4. Click **Import**. The Import Role Mappings dialog box displays.
-



5. Click the **Download Template** link.

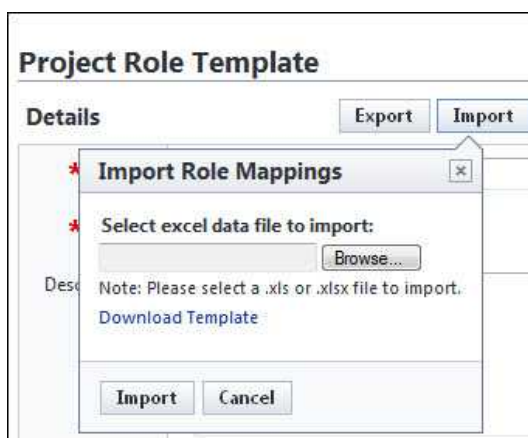
Related Topics:

- [About Project Level Roles](#)


#### 1.20.2.3.2 Import Project Role Templates

To import project role templates:

1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
2. Click **Project Role Templates**.
3. Click **Add**.
4. Complete all necessary fields.
5. Click **Import**. The Import Role Mappings dialog box displays.



6. Click the **Browse** button.
7. Navigate to and select the project role template.
8. Click **Import**. A success message displays, confirming the import and informing you to go back and save the record.
9. Click **Go Back**.

 **Tip:** Notice the users and roles specified in the import file are listed in the **Selected Users** section. Review this list for accuracy.

10. Click **Save**.

#### Related Topics:

- [Download Project Role Template](#)
- [About Project Level Roles](#)


#### 1.20.2.3.3 Apply Project Role Templates

Project role templates can be applied to a project from two different locations; The Project Participants page and the Apply Templates page.

In addition to being added to the template, users must also be members of the project for the template to take effect. Otherwise, non-project members will be ignored. For instructions, see [Add User to Projects](#).

To apply project role templates:

1. Click the **Projects** tab on the Top Navigation Tabs.
2. Select a project from the Projects drop-down menu.
3. From the Project Menu, click **Project Participants**.


 **Tip:** Click the Members link to ensure that the users in the project role template are also project members.

4. Click **Apply Role Template**. The Select Role Template dialog box displays.
  5. Click the drop-down arrow to select the role template you want to apply.
  6. Click **Apply**. A success message displays.
-

Related Topics:

- [About Project Level Roles](#)

#### 1.20.2.3.4 Create Project Role Templates within e-Builder

 **Note:** The recommended way to create project role templates is to first create the template using an Excel® spreadsheet (a template is available, see [Download Project Role Template](#) for instructions.) and then [import it](#) into e-Builder Enterprise. However, a template can also be created within e-Builder Enterprise.

To create project role templates within the system:

1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
2. Click **Project Role Templates**.
3. Click **Add**.
4. Complete all required fields.
5. In the **Setup** section, click the **Role** drop-down menu and select a role. Members of this role display in the **Unselected Users** section.
6. Select the user(s) to add to this role template and click the right directional arrow. Selected users are added to the **Selected Users** box.
7. Repeat steps 5 and 6 for all of the roles you want to add to the template.
8. Click **Save**.

Related Topics:

- [About Project Level Roles](#)

#### 1.20.2.3.5 Edit Project Role Templates

The recommended way to edit project role templates is to modify the Excel® template and import it into e-Builder Enterprise™. This makes saved templates easily accessible from your local machine. For instructions, see [Download Project Role Templates](#) and [Import Project Role Templates](#).

However, you can also edit a template within e-Builder Enterprise™:

To edit project templates within e-Builder Enterprise™:

1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
2. Click **Project Role Templates**.
3. Click the **Edit** link next to the template you want to edit.
4. To remove users from the template, in the **Setup** section, select the users from the **Selected Users** box and click the left directional to add them to the **Unselected Users** box.
5. To add users to the template, in the **Setup** section, click the **Role** drop-down menu and select a role. Members of this role display in the **Unselected Users** section.
6. Select the user(s) to add to this role template and click the right directional arrow. Selected users are added to the **Selected Users** box.
7. To continue adding users from different roles, repeat steps 5 and 6 for all of the roles you want to add to the template.
8. Click **Save**.

Related Topics:

- [About Project Level Roles](#)

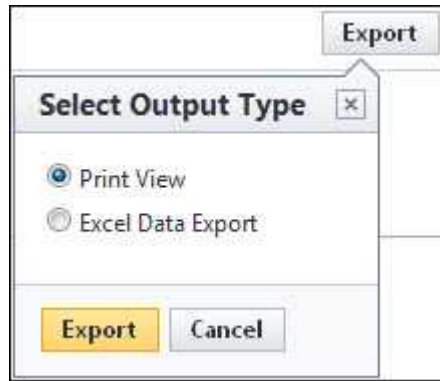
1.20.2.3.6 Export/Print Project Role Template

The printing option has two views; the print view and data export view. The print view is used for reporting and general knowledge. It cannot be used to reimport the template. The data export view, however can be imported into the system.

To export a project role template:

1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
  2. Click **Project Role Templates**.
  3. Click the title of the template you want to export.
  4. Click **Export**. The **Select Output Type** dialog box displays.
-





5. To print the template, select the **Print View** radio button.  
Or  
To export the file, click the **Excel Data Export** radio button.
6. Click **Export**.


Related Topics:

- [About Project Level Roles](#)

#### 1.20.2.4 Managing Project Role Associations

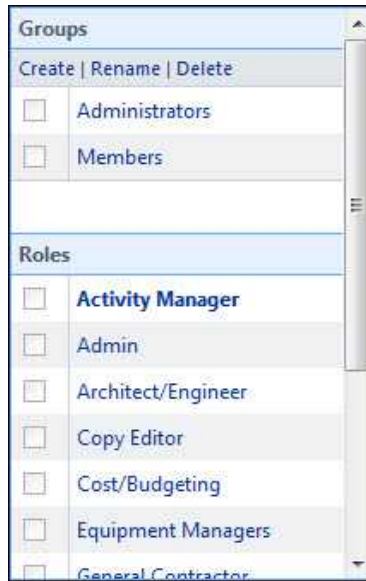
##### 1.20.2.4.1 View User and Role Associations Grouped by Role

Viewing role association grouped by role will allow you to see all members within a role and whether or not they are members on the account or project level. This is beneficial to ensure that user roles associations are configured as expected.

 **Note:** It's possible for a user to be within a role on both the account and project levels, but if this is the case, the account role will take precedence, which means that the user will be in this role on all projects that they are a member of. For instructions on removing users from an account role, see [Remove Users from Account Role](#).

To view user role associations by Role:

1. From the Top Navigation Tabs, click the **Projects** tab.
2. Choose the project from the **Projects** drop-down menu.
3. From the Projects Menu, click **Project Participants**.
4. In the Roles section, click the role you want to view associations for.



A list of members in this role display with a check mark that indicates whether or not they are members of this role on the account or project level.

<input type="checkbox"/>	Name^	User Name	Company Name	Account Role	Project Role
<input type="checkbox"/>	Bruzenskey Bois	BBois	Construction Depot		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Zakai Cody	Zakai Cody	Construction Depot	<input checked="" type="checkbox"/>	

#### Related Topics:

- [Edit Project Role Associations](#)
- [About Project Level Roles](#)


#### 1.20.2.4.2 View User and Role Associations Grouped by User

Viewing role associations per user allows you to see the account and project roles that the user belongs to and it gives you the opportunity to make changes if necessary. Accessing this information from the Manage Membership page also gives you the opportunity to view and make changes to project membership and role templates. This is beneficial to ensure that user roles associations are configured as expected.

To view user and role associations by user:

1. Go to the Users Settings. For Instructions see, [Access Users Settings](#).

2. Click **Manage Users**.
3. Click the name of the user.
4. Click **Manage Membership**.
5. Click the **Account Roles** tab to view the account roles this user is a member of.
6. Click the **Project Roles** tab and make a selection from the **Roles** drop-down menu to view the project roles this user is a member of.

 **Note:** If a user is in the same role on both the account and project levels, the account role will take precedence, which means that the user will be in this role on all projects that they are a member of. To maintain project level roles only, [remove the user from the account role](#).

From here you can take any of the following actions:


- [Edit Project Role Associations](#)
- [Remove User from Account Level Roles](#)

Related Topics:

- [About Project Level Roles](#)

#### 1.20.2.4.3 Edit Project Role Associations

Users can be placed in different roles across different projects. Modifying project role associations allows you to change the project roles that a user is a member of or change a user's project membership.

 **Note:** Remember, a user must be a member of the project for project roles to take effect. For instructions, see [Add Users to Projects](#).

Edit Project Roles

To change project role associations:


1. Go to the Users Settings. For instructions see, [Access Users Settings](#).
2. Click **Manage Users**.
3. Click the name of the user.
4. Click **Manage Membership**. The Projects tab is selected.

5. Click the **Project Roles** tab.
6. Click the **Roles** drop-down arrow to select a role to modify the user's association for.
7. To add the user to the selected project role, select the project(s) from the 'All Projects' box and click the right directional arrow to add the project(s) to the 'Selected Projects' box. Repeat steps 6 and 7 for all of the project roles you want to add this user to.

Or

To remove the user from a the selected project role, select the project(s) from the 'Selected Projects' box and left the right directional arrow to add the project(s) to the 'All Projects' box. Repeat steps 6 and 7 for all of the project roles you want to disassociate with this user.

8. Click **Save**.

 **Note:** For project roles to effect, the user must not be a member of this role on the account level. For instructions, see [Remove Users from Account Roles](#)

Related Topics:

- [About Project Level Roles](#)

### 1.20.2.5 Supplemental Project Level Role Tasks

#### 1.20.2.5.1 Add New Account Roles

To add new account roles:

1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
2. Click **Manage Roles**.
3. Click **Add Role**.
4. Enter a name for this account role.
5. Click **Save**.

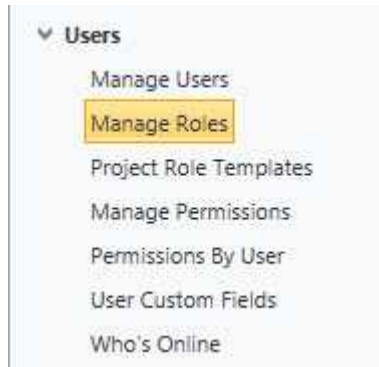
From here you can [Add Users to Account Roles](#).

---

## 1.20.2.5.2 Add Users to Account Roles

To add users to account roles:

1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
2. Click **Manage Roles**.



The Manage Roles page displays.

3. Click the title of the role.
4. Click **Add User to Role**.
5. Select the check box next to the users you want to add to this role.
6. Click **Add User**.

Related Topics:

- [Add New Account Roles](#)
- [About Project Level Roles](#)

## 1.20.2.5.3 Add Users to Projects


To grant users project membership:

1. Go to the Users Settings. For Instructions see, [Access Users Settings](#).
2. Click **Manage Users**.
3. Click the name of the user.
4. Click **Manage Membership**. The Projects tab is selected.
5. From the 'All Projects' box, select the projects you want to add this user to and click the right directional arrow to add them to the 'Projects That User Is A Member Of' box.

6. Click **Save**.

#### 1.20.2.5.4 Add User to Project Level Role


To add users to project level roles:

 **Note:** Remember, when adding users to a project level role ensure that no users are added to the account level role, because if they are, they will have the role's permissions across all projects.

1. Go to the Users settings. For instructions, see [Access Users Settings](#).
2. Click **Manage Roles**.
3. Click the title of the role. All users currently in the account role display on the Users table.
4. Select the check box next to the user(s) you want to add to the role.
5. Click **Apply to Project Level**.

A message displays informing you that the selected users will be placed in the project level role on all projects that they are a member of. See [Edit Project Role Associations](#) for instructions on placing users in different project roles.

6. Click **OK**.

 **Tip:** Click the number in the Project Level column to view the projects that the user is a member of.

#### 1.20.2.5.5 Remove Users from Account Level Roles

When applying project level roles, it is necessary to remove these users from the account role because the account level role takes precedence over the project role. Once this occurs project level roles will take effect.

To remove users from account roles:

1. Go to the Users settings. For instructions, see [Access Users Settings](#).
  2. Click **Manage Roles**.
  3. Click the title of the role.
  4. Select the check box next to the user(s) you want to remove from the
-

account role.

5. Click **Remove From Role**. A confirmation message displays.
6. Click **OK**.

## 1.21 Settings

There are general account settings that are maintained by the e-Builder Administrator. These settings can be modified at any time to reflect a change in process, security, or company logo.

### 1.21.1 Account Settings

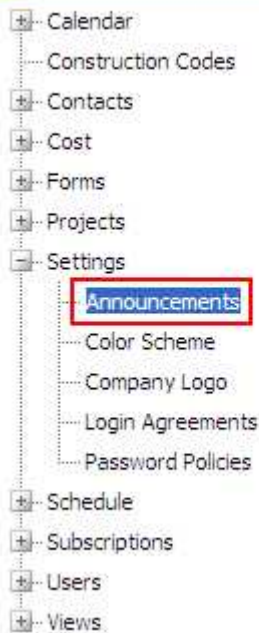
The Account Settings page includes settings for various areas of the product. A description of the fields and buttons located on this page is provided in the table below.

Field	Description
<b>Save Changes</b>	Click to save changes. All unsaved changes will be lost.
<b>Comment Settings</b>	
<b>Allow comments to be deleted in</b>	<p><b>Forms</b> - Select this check box to allow comments to be deleted from form instances.</p> <p><b>Processes</b> - Select this check box to allow comments to be deleted from process instances.</p>
<b>Access Delegation</b>	
<b>Allow access delegation</b>	<p>This check box is selected by default and indicates that the Access Delegation feature is enabled on the account. Clear this check box to disable this feature.</p> <p>For more information, see About Access Delegation</p>

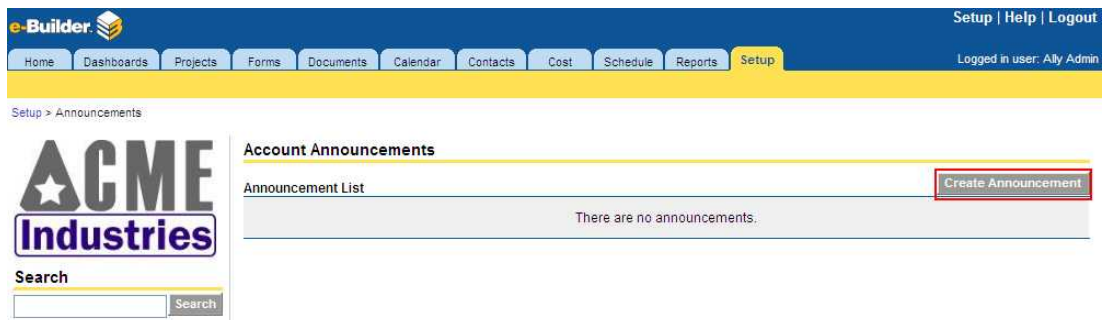
## 1.21.2 Announcements

Announcements allow you communicate to your team important communication. This information will then be displayed on the Home module. To manage the Announcements for your account click Administration Tools - Settings - Announcements.

### Administration Tools



To create an announcements, press Create Announcement.



Enter the Subject and the Body of the announcement. Then update the Expiration Date of when the announcement will be removed from showing on the Home module. When the announcement is complete, press Save.



**Account Announcements**

Announcements Details

Subject: Test Announcement

Body: This is a test announcement

Expiration Date: 12.16.2010 12:00 AM

Save Cancel

Save Cancel

To edit the announcement at any time just select the announcement from the Announcement List and press Save to change.

**Account Announcements**

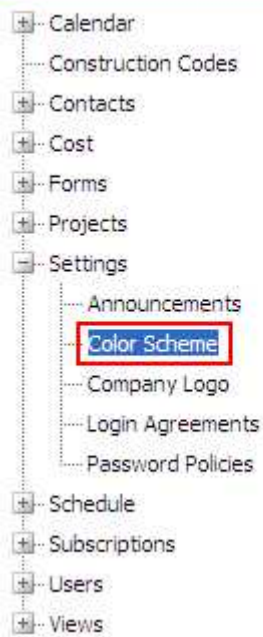
Announcement List Create Announcement

Subject	Date Posted	Date Expires
Test Announcement	12.15.2007 04:36 PM	12.16.2010 12:00 AM

### 1.21.3 Color Scheme

Color Scheme allows you change the colors of your e-Builder account to match your company colors. Once you change the colors, it will be updated for all users. To manage the Color Scheme for your account click Administration Tools - Settings - Color Scheme.

## Administration Tools

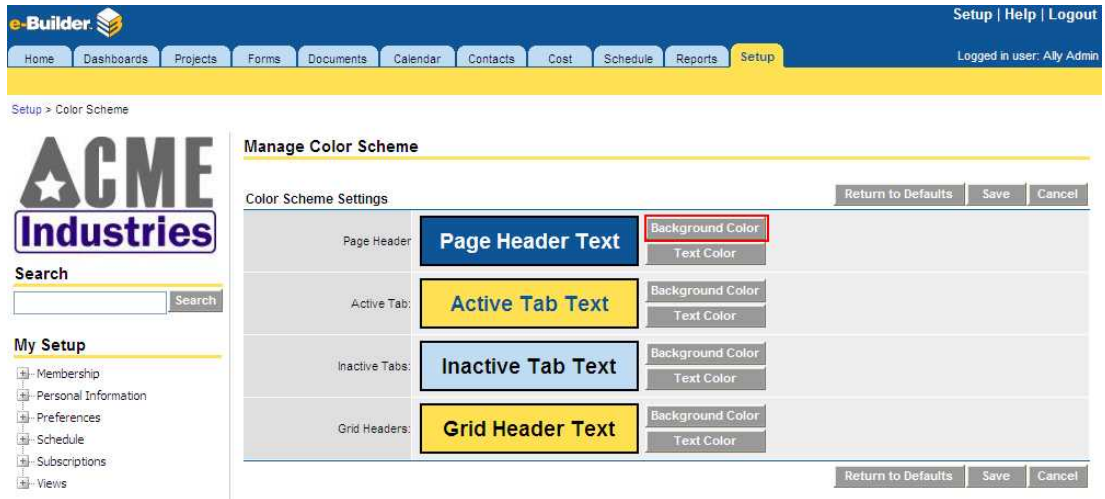


The color scheme can be changed on the background and text for the following areas:

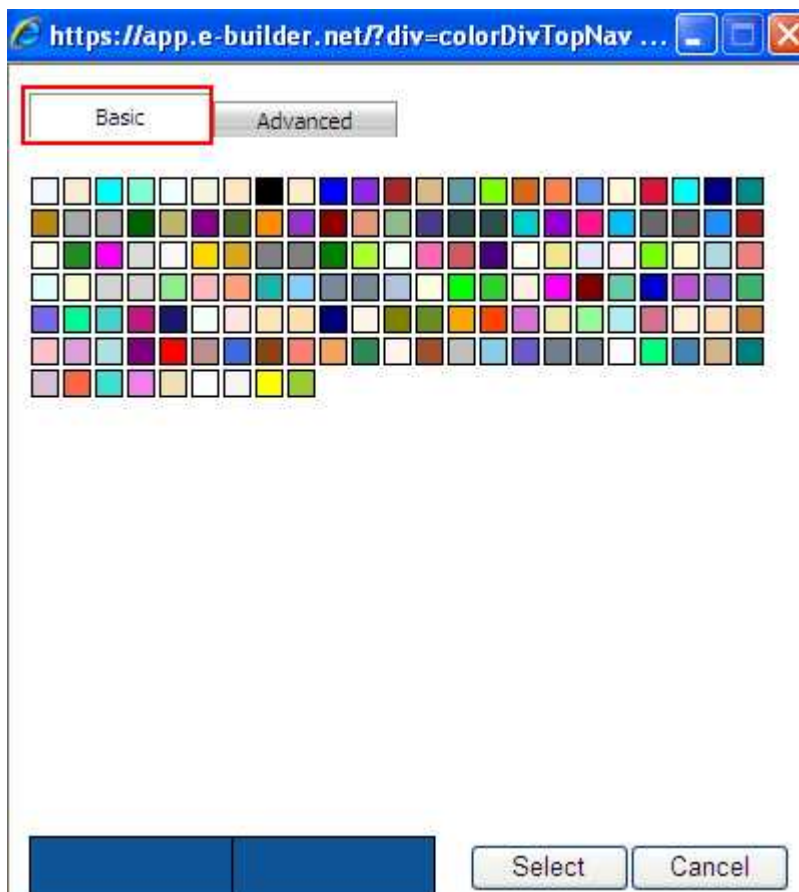
- Page Header
- Active Tab
- Inactive Tab
- Grid Headers

To change the color on any of these areas is the same. Just press on the Background Color or Text Color button next to the area.

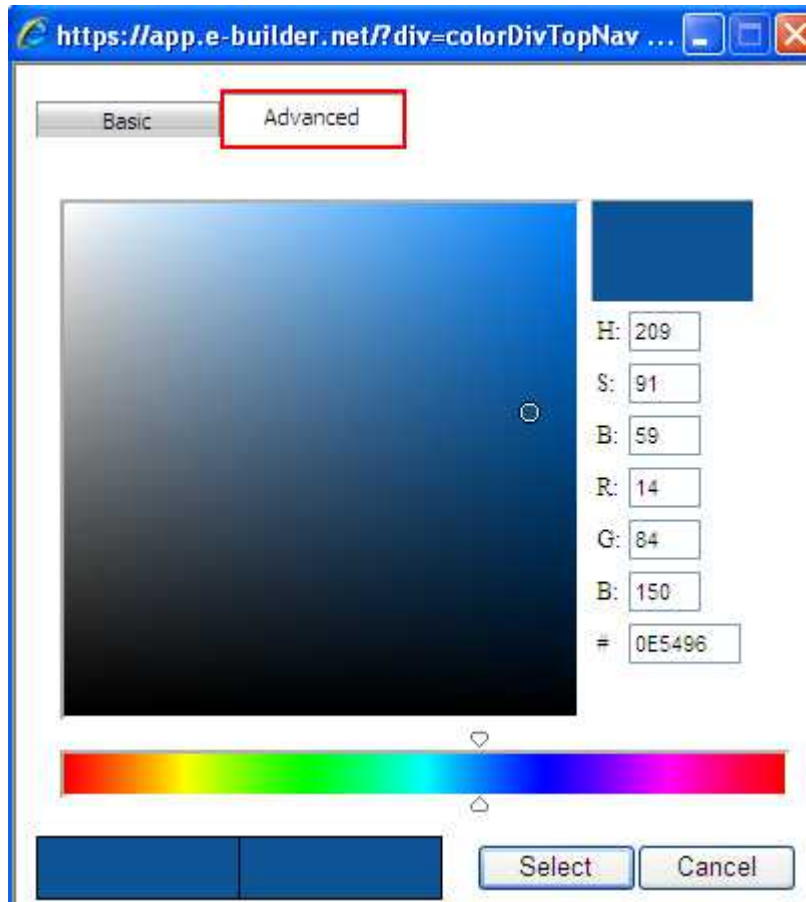
---



A basic color palette will appear for you to select the proper color. Once you select the color, press Select.



If you want more advanced colors, click on the Advanced tab. This will allow you to move the circle to get the proper shade of your color. If you have the exact color scheme from your marketing group, you can enter the appropriate color numbers on the palette. Once you select the color, press Select.



The selected color will now show as a preview. If you do not like the color, press the appropriate button and follow the same process. When all the colors have been selected, press Save.


**Manage Color Scheme**

Color Scheme Settings Return to Defaults Save Cancel

Page Header:	<b>Page Header Text</b>	Background Color	
		Text Color	
Active Tab:	<b>Active Tab Text</b>	Background Color	
		Text Color	
Inactive Tabs:	<b>Inactive Tab Text</b>	Background Color	
		Text Color	
Grid Headers:	<b>Grid Header Text</b>	Background Color	
		Text Color	

Return to Defaults Save Cancel

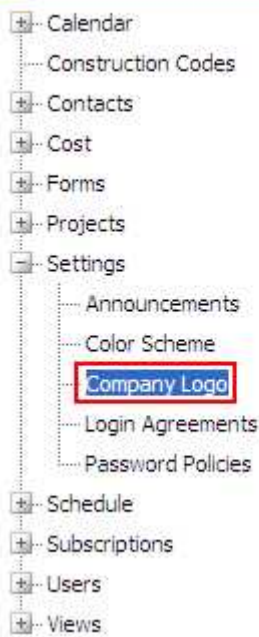
If you do not like the color scheme or want to revert to the default color scheme, press Return to Defaults.

 Note: The color scheme is an account level setting. The color scheme will appear for all projects.

#### 1.21.4 Company Logo

Your company logo can be branded onto your e-Builder account. If your company logo changes at any time, it is simple to update the logo on your e-Builder account. To manage the company logo for your account click Administration Tools - Settings - Company Logo.

## Administration Tools




You need a standard image file (e.g. .jpg, .bmp) of your company logo. Press the Browse button.



A browse window will open and you must navigate to the folder where the file is located on your local computer or network. Select the file, and press Open.

Once the file has been selected, press Save New Logo.

 Note: The company logo is an account level setting. The logo will appear for all projects.

### 1.21.5 Export Header and Footer

Export header and footer setting allows you to set the header and footer for all exported reports generated in your account. As an administrator you can standardize the header and footer to be in line with corporate policy. To access this page and manage the export header and footer for your account, do the following:

1. Click **Setup**.
2. In the Administration Tools, click **Settings**.
3. Click **Export Header and Footer**. The Export Header and Footer page displays.



Enter text and press the appropriate icon contained in each grid to insert additional tags.

**Export Header and Footer**

---

Header

Preview Save Cancel

Left Section	Center Section	Right Section
<p><b>B</b> <i>I</i> <u>U</u> [Page Title] [Page Number] [Date] [Time] [User]</p> <p>ACME INDUSTRIES</p>	<p><b>B</b> <i>I</i> <u>U</u> [Page Title] [Page Number] [Date] [Time] [User]</p> <p>{Title}</p>	<p><b>B</b> <i>I</i> <u>U</u> [Page Title] [Page Number] [Date] [Time] [User]</p>

Footer

Left Section	Center Section	Right Section
<p><b>B</b> <i>I</i> <u>U</u> [Page Title] [Page Number] [Date] [Time] [User]</p> <p>Report run by {User} on {Time}</p>	<p><b>B</b> <i>I</i> <u>U</u> [Page Title] [Page Number] [Date] [Time] [User]</p> <p>Page {Page} of {Pages}</p>	<p><b>B</b> <i>I</i> <u>U</u> [Page Title] [Page Number] [Date] [Time] [User]</p> <p>{Date}</p>

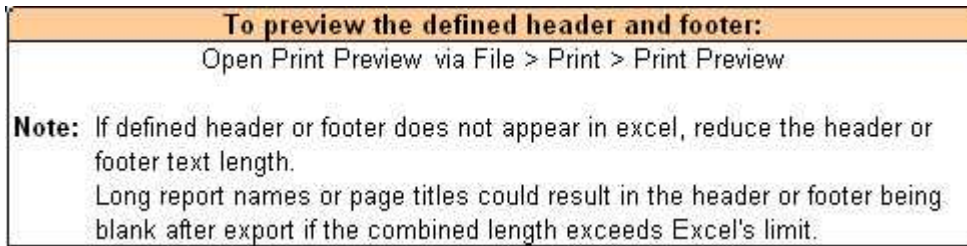
Each icon is described below:

File Ids	Description
<b>B</b>	Bold the text.
<i>I</i>	Italicize the text.
<u>U</u>	Underline the text.
[Page Title]	Insert page title / report name (e.g. Anticipated Cost Report)
[Page Number]	Insert page number.
[Page Count]	Insert number of pages.
[Date]	Insert today's date.
[Time]	Insert time report is exported.
[User]	Insert logged in user.

Press the Preview button to save a blank excel file (Preview.xls) with the header and footer settings configured. When the excel file opens the following explanation



will be presented as shown below.



Press the Save button to save the current settings. Press the Cancel button to cancel all changes since the last save.

### 1.21.6 Fiscal Year

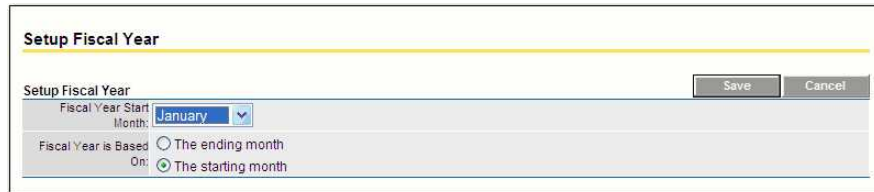
e-Builder's fiscal Year functionality allows you to specify a fiscal year for your projects. You can specify a year that begins on any months of the year. Moreover, you can specify if the year is based on the first month of the year, or the last month of the years.

To access the Fiscal Year functionality, click Setup > (Administration Tools) > Fiscal Year:



The screen shown below will be displayed:

---



**Setup Fiscal Year**

Setup Fiscal Year Save Cancel

Fiscal Year Start Month: January

Fiscal Year is Based On:  The ending month  The starting month

## How Do I Set Up Our Fiscal Year?

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To set up a fiscal year, follow these steps:

1. From the Setup Fiscal Year screen, click the Fiscal year Start Month arrow, and select the month of your fiscal year start.
  - 1a. If your fiscal year is based on the ending month of the year, click the radio button so-labeled. If your fiscal year is based on the starting month of the year, click that radio button.
2. When done, click Save. your fiscal years is now set up. When you complete your transactions and controls in the Cost module, they will be based on the fiscal year set up in this module.

### 1.21.7 Login Agreements

Login agreements are used to protect your company by requiring all users to accept your terms of use for access and use of the project information. A login agreement requires a user to read and accept your terms of user prior to accessing any project information. To manage the login agreements for your account click Administration Tools - Settings - Login Agreements.

## Administration Tools

- + Calendar
  - Construction Codes
- + Contacts
- + Cost
- + Forms
- + Projects
- Settings
  - Announcements
  - Color Scheme
  - Company Logo
  - Login Agreements**
  - Password Policies
- + Schedule
- + Subscriptions
- + Users
- + Views

To create the login agreement, press Create Agreement.

The screenshot shows the e-Builder Administration Tools interface. The top navigation bar includes 'Home', 'Projects', 'Forms', 'Documents', 'Contacts', 'Bidding', 'Reports', and 'Setup'. The 'Setup' menu is expanded to show 'Login Agreement'. The main content area is titled 'Account Login Agreements' and features a table with columns for 'Name', 'Date Added', and 'System Agreement'. A 'Create Agreement' button is visible in the top right corner of the table area. The Acore Construction logo is displayed on the left side of the page.

Enter the name of the agreement, and then enter the agreement verbiage in the Text field. Press Save to save the agreement.

Account Login Agreements

Agreement Details Save Cancel

Name:

Text:

The login agreement will now show in your agreement list. To view the agreement and any users who have accepted the login agreement terms, click on the login agreement name.

Account Login Agreements

Agreement List Create Agreement

Name

Test Agreement

In the Acceptance List at the bottom of the page you will see the name, username and agreement date of each user who has accepted the login agreement.

Account Login Agreements

Agreement Details Delete Agreement


Name: Test Agreement


Text: This is a test agreement


Acceptance List

Name	Username	Date Agreed

If you wish to delete the login agreement, press Delete Agreement. By deleting an agreement, you also delete the acceptance list history of that agreement. A system agreement cannot be deleted. System agreements are configured per the account setup by the e-Builder team and are not able to be modified by an administrator.

 **Tip:** It is recommended that you have the proper person create or review the login agreement verbiage to ensure it meets your company's document security requirements.

 **Note:** Multiple login agreements can be set. When the user(s) log onto your account they will be prompted from one agreement to the next until all of them are accepted or declined.

 **Note:** If a user declines a login agreement, they will not be allowed access to your account. They must login again and accept the agreement before they will be granted access to your project(s).

### 1.21.8 Notification Settings

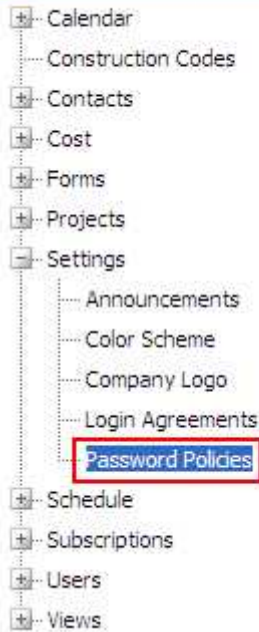
This page allows you to customize the notifications so that all system notices will be sent from a specific person's name.

Field	Description
Save	Click to save changes. All unsaved changes will be lost.
Cancel	Click to discard changes.
<b>Notification Settings</b>	
From Name	Enter the name of the person to be placed in the "From" field for all system messages.

### 1.21.9 Password Policies

Password policies allow you setup a password policy that complies to your company standards. To manage the password policies for your account click Administration Tools - Settings - Password Policies.

#### Administration Tools



The password policy can be set with a variety of options. The policy fields are:

<u>Field</u>	<u>Description</u>
Minimum Password Length	Minimum length of password
Password Complexity Requirements	Character requirements in password
User Passwords Expire Every	Duration for auto-expiration of password requiring user to change password

Password History	Number of past passwords to remember and not allow them to be reused
Maximum Failed Login Attempts	Number of incorrect passwords entered before user is locked
Maximum Failed Logins Exceeded Locked Period	Duration user is locked from e-Builder access before they can try to log in again
User Inactivity Timeout	Duration for auto-logout of user from e-Builder when the browser window has not been active utilizing e-Builder

Setup > Password Policies

**ACME Industries**

Search


My Setup

- Membership
- Personal Information
- Preferences

**Password Policies**

Minimum Password Length:	No restriction	Save
Password Complexity Requirements:	No restriction	
User Passwords Expire Every:	Never expire	
Password History:	No passwords remembered	
Maximum Failed Login Attempts:	No limit	
Maximum Failed Logins Exceeded Lockout Period:	15 minutes	
User Inactivity Timeout:	Never automatically log out user	Save

To apply the required settings for your company, modify the Password Policies and press Save.

 Note: If the Maximum Failed Logins Exceeded Locked Period is set to Forever only the e-Builder Administrator can reset the users password. This is reset in the Administrative Tools - Users - Manage Users.

## 1.22 Schedule

### 1.22.1 About the Schedule Module

#### **About the Schedule Module**

Have you ever worked on a project where 100% of the time the projects had schedules that were kept updated; where at any time on any given day you could know the exact status on any project you choose, or of all the projects? No? That's the way it is for most people, but that's where e-Builder can help.

#### **A Programmatic Perspective**

e-Builder supports the different team members that are involved in the project. Using the Schedule module helps ease the hectic nature associated with managing large scale schedules across multiple projects. e-Builder scheduling gives schedule managers and account administrators a single system that helps them coordinate various activities and people in order to actualize specific goals. Scheduling allows you to view the project at a high level and organize the details that need to be completed to ensure project success. e-Builder Schedule is ideal for owners, as well as developers, program managers, and construction managers managing multiple projects in various stages of development, from planning, through design, procurement and construction.

#### **Schedule Management**

The system allows team members to access and update the schedule in real time. This keeps all project participants and stakeholders up-to-date on all changes as they happen. And, as each individual team member marks their tasks complete on a project, the schedule is automatically updated and maintained, minimizing administrative work for the project manager. With up-to-date and accurate information at your fingertips, you will be able to make informed, faster decisions thereby improving the scheduling process and mitigating risk.

#### **Identifying Critical Paths**

As team members update their tasks, the system will calculate the durations of each of the paths through a project, identify the critical paths, and give the project duration. e-Builder will help to ensure that the shortest path to complete the project is taken. This gives the project manager the ability to specify what must be done, and by when to ensure a successful project outcome.

#### **About Schedule Settings**

Configuring Schedule settings allow account administrators to set the framework

---




for this module. Schedule settings consist of the following main tasks:

- [Creating master tasks and master processes](#)
- [Setting up the schedule calendar](#)
- [Adding schedule custom fields](#)
- [Determine whether or not the baseline can be resaved](#)
- [Determine whether or not the schedule will be linked to the project's start and end dates](#)
- [Create schedule templates](#)

## 1.22.2 Access Schedule Settings

To access Schedule settings:

1. Click the **Setup** tab from the Top Navigation Tabs.

 **Note:** If this tab is not visible, click the **Plus** tab, and then click the **Setup** link.



2. In the **Administration Tools** section, expand **Schedule**. All Schedule related settings display.


## 1.22.3 Managing Master Processes and Master Tasks

### 1.22.3.1 About Master Processes and Master Tasks

#### Master Processes

Master Processes are created to categorize and report on Master Tasks. Having master processes allows you to standardize the different types of tasks that might exist across all of your projects for reporting purposes. In some cases, only a single master process might be necessary. Project schedules use these processes to filter and view activities in the schedule that are linked to certain master tasks.

## Master Tasks

 **Note:** The terms master tasks and master activity are used synonymously in the user interface.

Master tasks are created by the account administrator and used to identify similar project phases that may be referred to by different names across multiple projects. For example, one project might use the term, 'Closeout' and others may use 'Final Completion', 'Project Close Out' or 'Closeout/Occupancy'. The master task is a unique identifier that unifies all of these project phases so that account administrators and executives can report on the status of these phases across all projects. All master tasks have a numerical prefix that allows you to link similar project phases to one another.

From the [View Master Process page](#) you will be able to link master processes to master tasks so that when schedule managers identify their summary tasks as one of these master tasks, the association would have already been established, which will strengthen the value of your reports. The following topics will help you manage master processes and master tasks:

- [Add Master Processes](#)
- [Edit Master Processes](#)
- [Delete Master Processes](#)
- [Add Master Tasks to Master Processes](#)
- [Edit Master Tasks](#)
- [Delete Master Tasks](#)

### 1.22.3.2 Add Master Processes

Master Processes are used to categorize and report on Master Tasks. This gives administrators the ability to report across projects by phases or tasks. Having master processes allows you to standardize the different types of tasks that might exist across all of your projects. In most cases, only a single master process is created. Project schedules use these processes to filter and view activities in the schedule that are linked to certain master tasks. After creating the master process, you'll have to [add master tasks](#) to it.

To add master processes:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
-


2. Click **Master Processes/Tasks**.
3. Click **Add**.
4. Complete all necessary fields. For a description of each field and button, see [Add/Edit Master Process Page Overview](#).
5. Click **Save**.

Related Topics:

- [About Master Processes and Master Tasks](#)
- [Add Master Tasks to Master Processes](#)


### 1.22.3.3 Add Master Tasks to Master Processes

Linking master processes to master tasks supports the reporting needs of the program. When schedule managers associate summary tasks to one of the established master tasks, you'll be able to report on all of the master tasks and summary tasks linked to the master process.

 **Note:** Master tasks are a subset of master processes. You can link one or more of these tasks to a master process. They can only be added after you've saved the associated master process.


To add master tasks to master processes:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Master Processes/Tasks**.
3. Click the title of the master process you want to add master tasks to. The [View Master Process page](#) displays.
4. Click **Add**.
5. In the **Task Name** field, enter a name for the task.


 **Tip:** Remember, master tasks are used to identify similar project phases across multiple projects, so it is advisable to use a generic, but descriptive name that will be easily understood by schedule managers across the program, such as Planning, Bidding or Closeout.

6. Click the **Process Number** drop-down arrow to select a process to link this task to. The **Task Number** field automatically populates with a unique identifier, but you are able to change this number if you wish.

7. Click the **Task Type** drop-down arrow to specify whether this is a task or an event.

 **Note:** An event can be classified as a meeting or an approval of item(s). Specifying events gives the Schedule Manager the ability to better manage the schedule by identifying when work is actually being done versus a decision making or approval process that may or may not impact the schedule.

9. Specify whether is task is a milestone.

 **Note:** A milestone can be considered a task that is critical to the project's success.


10. Enter a description in the **Description** field to provide clarity for schedule managers.
11. Click **Save**.

Related Topics:

- [About Master Processes and Master Tasks](#)

#### 1.22.3.4 Edit Master Processes

Master processes can be modified by changing the process name, number, status or description.

 **Note:** You cannot delete any of the already defined Master Processes or Master Tasks that are in use. A process or task is in use if it is assigned to one or more schedule(s) in e-Builder. However, you do have the option of disabling the Master Process so as to prevent any new Master Tasks from being assigned to it.


To edit master processes:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
  2. Click **Master Processes/Tasks**.
  3. Click the **Edit** link next to the process you want to modify.
  4. Make all necessary changes. For a description of the fields and buttons on this page, see [Add/Edit Master Process Page Overview](#).
  5. Click **Save**.
-

Related Topics:

- [About Master Processes and Master Tasks](#)

### 1.22.3.5 Delete Master Processes

 **Note:** Master processes that have already been associated with tasks in the user interface cannot be deleted unless the associated master process and tasks are also deleted.

To delete master processes:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Master Processes/Tasks**.
3. Click the **Delete** link next to the process you want to remove. A confirmation page displays.
4. Click **Yes, Delete**.

Related Topics:

- [About Master Processes and Master Tasks](#)

### 1.22.3.6 Edit Master Tasks

To edit master tasks:


1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Master Processes/Tasks**.
3. Click the master process the task is associated to. The View Master Process page displays and a list of available master tasks display half way down the page.
4. Click the **Edit** link of the task you want to modify.
5. Make all required changes. For a description of the fields and buttons on this page, see [Add/Edit Master Task Page Overview](#).
6. Click **Save**.

Related Topics:

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- [About Master Processes and Master Tasks](#)

### 1.22.3.7 Delete Master Tasks

 **Note:** Master tasks that have already been associated with tasks in the user interface cannot be deleted unless the associated tasks are also deleted.

To delete master tasks:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Master Processes/Tasks**.
3. Click the master process the task is associated to. The View Master Process page displays and a list of available master tasks display half way down the page.
4. Click the **Delete** link of the task you want to remove. A confirmation page displays.
5. Click **Yes, Delete**.

Related Topics:

- [Edit Master Tasks](#)
- [Add Master Tasks to Master Processes](#)
- [About Master Processes and Master Tasks](#)

## 1.22.4 Managing Calendar Exceptions

### 1.22.4.1 About Calendar Exceptions

Calendar exceptions are days that will be treated as an exception to the general rule, such as holidays that fall on typical working days. From this page you can choose particular dates and mark them as working or non-working days. Identifying these days at the onset of a project helps the schedule manager plan more effectively. In the Schedule module, the schedule manager has the opportunity to specify the days of the week that will be included in a typical work week.

### 1.22.4.2 Add Calendar Exceptions

Calendar exceptions allow you to identify certain days as working or non-working days.

To add calendar exceptions:

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1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Calendar Exceptions**.
3. In the **Date** field, enter the date that you want to make the exception.
4. Click the adjacent drop-down arrow and select **Non-working** or **Working**.
5. Click **Add**.

#### 1.22.4.3 Delete Calendar Exceptions

To delete calendar exceptions:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Calendar Exceptions**.
3. Select the check box next to the date(s) you want to remove.
4. Click **Delete**.

### 1.22.5 Managing Schedule Custom Fields

#### 1.22.5.1 Add Schedule Custom Fields

Custom fields allow you to gather additional information that may not be covered in the schedule or schedule details for reporting purposes. Although you can add schedule custom fields in the Schedule Settings, it is recommended that custom fields are added through Global Custom Fields, which will allow you to add custom fields to any e-Builder module or object. For more information on custom fields, see [About Global Custom Fields](#).

To add Schedule custom fields:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Expand **Custom Fields** and click **Schedule**.
3. Click **Add Field**.
4. Select a data type, and then click **Next**.
5. On the **Custom Field Details** page, enter a name for the custom field in the space provided after **Field Label**.
6. Click **Next**.

7. Review the details of the custom field.
8. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

Or

If details are correct, click **Save**.

#### 1.22.5.2 Add Schedule Template Custom Fields

Create schedule template custom fields to gather additional information that is not part of the standard schedule custom fields every time the template is applied and used. For more information on custom fields, see [About Global Custom Fields](#).

To add schedule template custom fields:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Expand **Custom Fields** and click **Schedule Templates**.
3. Click **Add Field**.
4. Select a data type, and then click **Next**.
5. On the **Custom Field Details** page, enter a name for the custom field in the space provided after **Field Label**.
6. Click **Next**.
7. Review the details of the custom field.
8. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

Or

If details are correct, click **Save**.

#### 1.22.5.3 Add Task Custom Fields

To add Task custom fields:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
  2. Expand **Custom Fields** and click **Task**.
  3. Click **Add Field**.
-



4. Select a data type, and then click **Next**.
5. On the **Custom Field Details** page, enter a name for the custom field in the space provided after **Field Label**.
6. Click **Next**.
7. Review the details of the custom field.
8. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

Or

If details are correct, click **Save**.

## 1.22.6 Managing Schedule Options

### 1.22.6.1 Edit Schedule Options

The schedule options allow you to do two things: determine whether or not a schedule manager is able to resave the baseline after it has been set; and decide whether or not to link the project start and target date with the schedule. However, in the Project Details, if a start and target date are entered, these dates will be used as the schedule's start and target dates. If this is the case, users will not be able to modify these dates in the schedule.

To edit the schedule options:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Options**.
3. To restrict the schedule manager from resaving the baseline after it's been saved, select the **Restrict Schedule Manager from Resaving Baseline** check box.
4. To link the project start date and the target date with the schedule, select the **Link Project Start and Target Date with Schedule** check box.
5. Click **Save**.

## 1.22.7 Managing Schedule Templates

### 1.22.7.1 About Schedule Templates

Schedule templates are a great time-saving tool. They provide a prototype for project schedules. If you have projects that are similar in nature such as elementary schools, high schools, and parking garages, each of these project types can have a template that will ensure, at the minimum, the core tasks are addressed. Templates also give the schedule manager a framework for building and completing the project schedule. With very little verbal communication you and the schedule managers can be in sync with task schedule management.

The following tasks will help you manage schedule templates:

- [Add Schedule Templates](#)
- [Copy Schedule Templates](#)
- [Edit Schedule Templates Details](#)
- [Delete Schedule Templates](#)
- [About Schedule Template Import Fields](#)
- [Update Schedule Templates via Import](#)
- [Update Schedule Templates Manually](#)

### 1.22.7.2 Add Schedule Templates

Adding schedule templates is a two-part process. This is the first of two procedures and it includes completing the template details such as the name, the active or draft status, description, and if applicable, schedule template custom fields. The second and final step is to update the schedule template by adding tasks to it through an [import](#) or [manually](#).

To add schedule templates:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
  2. Click **Schedule Templates**.
  3. Click **Add**.
  4. Enter a name for the template in the **Name** field.
  5. To make this template available for use, select the **Active** check box. (This is the default selection)
-

Or

To leave it as a draft template, select the **Draft** check box.

6. Click **Save**.

Related Topics:

- [About Schedule Templates](#)
- [Update Schedule Templates via Import](#)
- [Update Schedule Templates Manually](#)

### 1.22.7.3 Copy Schedule Templates

Copying templates is a fast and easy way to create a new template from an existing one with similar characteristics.

To copy schedule templates:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Schedule Templates**.
3. Click the **Copy** link located left of the template you want to copy.
4. Modify the name of the template in the **Name** field.
5. In the **Status** field, select **Active** to make the template available for use or **Draft**.
6. Click **Save**.

Related Topics:

- [About Schedule Templates](#)
- [Add Schedule Templates](#)
- [Delete Schedule Templates](#)

### 1.22.7.4 Edit Schedule Template Details

Editing schedule templates allow you to modify details such as the template name, active/draft status, the description and if applicable, custom fields. For instructions on modifying tasks in the schedule template file, see [Update Schedule Templates via Import](#), or [Update Schedule Templates Manually](#).


To edit the details of a schedule template:


1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Schedule Templates**.
3. Click the **Edit** link located left of the template you want to edit.
4. Make any of the following modifications:
  - Change template name in the **Name** field.
  - Select the **Is Active** check box to make the template Active/Inactive.
  - If applicable, complete custom fields.
5. Click **Save**.

Related Topics:

- [About Schedule Templates](#)
- [Add Schedule Templates](#)
- [Copy Schedule Templates](#)
- [Delete Schedule Templates](#)

#### 1.22.7.5 Delete Schedule Templates

 **Warning:** Once a schedule template is deleted, it cannot be recovered. Deleted templates are immediately removed from the account and will no longer be available for use.

 **Tip:** If you do not want this template to be available for use, but you also don't want to remove it from the account, change its status to "draft." For instructions, see [Edit Schedule Template Details](#).

To delete Schedule templates:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Schedule Templates**.
3. Click the check box next to the template(s) you want to delete.
4. Click **Yes, Delete the Schedule Template**. You are prompted for confirmation.

Related Topics:

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- [About Schedule Templates](#)
- [Add Schedule Templates](#)
- [Copy Schedule Templates](#)

#### 1.22.7.6 About Schedule Template Import Fields

.mpp files, which can be exported from Microsoft Project are the standard Schedule import file type. Typically, import files will include the task name, duration, predecessors, and the start and finish dates; but for your convenience, e-Builder specific fields, which are listed below can also be included. Should the import file include any of these column by a different name, you'll be able to map these columns to the corresponding e-Builder fields during the import.

**Tip:** To avoid having to map your fields, change the column headers in the import file to match the e-Builder column names listed below.

A list and description of the e-Builder built-in fields are as follows:


The screenshot shows a dialog box titled "Import Schedule - Field Mappings" with "Step 2 of 3" in the top right corner. The dialog is divided into two main sections. The left section is titled "Task Built-In Fields" and contains three dropdown menus: "Master Task:", "Resource Role:", and "Approval required for changes?:". The right section contains three dropdown menus: "Type:", "Manager Role:", and "Approval required for completion?:". At the top right of the dialog are buttons for "Previous", "Next", and "Cancel". At the bottom right are also buttons for "Previous", "Next", and "Cancel".

- **Master Task** - Include master tasks to maintain the hierarchy established in e-Builder - doing so will support in-depth reporting. See [About Master Processes and Master Tasks](#) For more information.
- **Resource Role** - Allows you to specify the e-Builder role that task resources should be pulled from.
- **Manager Role** - Allows you to specify the e-Builder role that schedule managers should be pulled from.
- **Approval required for change?** - Allows you to determine whether or not approval is required for changes made to the task.
- **Type** - Allows you to determine whether or not the task is simply a task or an event. Although an event is still treated as a task in regards to duration, start and finish time, an event is classified as a meeting or an approval of item(s). Specifying events gives the Schedule Manager the ability to better manage the schedule by identifying when work is actually being done versus a decision making or approval process that may or may not impact the schedule.
- **Approval Required for work completion changes?** - Allows you to determine

whether or not approval is required when a resource marks a task complete. A list of possible values and a description of each is as follows:

- **No** - A manager's approval is not required when changes are made to the completion status of this task.
- **All Changes** - A manager's approval is required when any change is made to the task's completion status.
- **100% Only** - A manager's approval is only required when the task is set to 100% complete.

#### 1.22.7.7 Update Schedule Templates via Import

 **Note:** Adding tasks to the schedule template is step 2 of 2 when creating schedule templates. If you have not already done so, please [add a schedule template](#) before attempting to complete this task.

To add tasks to the schedule template through an import:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Schedule Templates**.
3. Click the title of the template you want to add tasks to.
4. Click **Import**.
5. Click **Browse/Choose File**.
6. Locate and select the import file.
7. Click **Next**.
8. If necessary, map the columns in the import file to the corresponding built-in e-Builder fields.
9. Click **Next**.
10. A count of the rows that imported successfully display on the **Preview** tab.
11. The **Exceptions** tab lists the rows that failed to import and the reasons why. Click this tab to view failed items.
12. To go back and make corrections to the import file, click **Previous** and on the Mappings page, click **Previous** again, and then follow step 5 and on.

Or

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
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To complete the import, click **Import**.

Related Topics:

- [About Schedule Templates](#)

### 1.22.7.8 Update Schedule Templates Manually

 **Note:** Adding tasks to the schedule template is step 2 of 2 when creating schedule templates. If you have not already done so, please [add a schedule template](#) before attempting to complete this task.

Tasks can be added to schedule templates through an [import](#) of a Microsoft Project .mpp file or manually, by adding one task at a time. The procedure below outlines the latter. In most cases, an import will be used, but manual entry might be necessary for adding additional tasks after the initial schedule has been uploaded.

To manually add tasks to a schedule template:

1. Go to Schedule settings. For instructions, see [Access Schedule Settings](#).
2. Click **Schedule Templates**.
3. Click the title of the template.
4. Scroll down to the Add Template Task section and complete all required fields. For a description of the fields on this page, see [Schedule Template Details Page Overview](#).
5. Click **Save**.

Related Topics:

- [About Schedule Templates](#)
- [Update Schedule Templates via Import](#)

## 1.22.8 Schedule Settings Page Overviews

### 1.22.8.1 Master Processes Page Overview

This page allows you to add new master processes and make changes to existing ones. Master Processes are created to categorize and report on Master Tasks. Having master processes allow you to standardize the different types of tasks that

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might exist across all of your projects for reporting purposes. After creating a master process, you'll have to [associate master tasks to it](#) so that when schedule managers identify their summary tasks as one of these master tasks that you've created, the association would have already been established, which will strengthen the value of your reports. For more information see [About Master Processes and Master Tasks](#). The following actions can be taken from this page:

- [Add Master Processes](#)
- [Edit Master Processes](#)
- [Delete Master Processes](#)

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Add</b>	Click to add a new master process.
<b>Edit</b>	Click to edit the details of the master process or its master tasks.
<b>Delete</b>	Click to delete the master process.
<b>Process #</b>	Lists the master process number.
<b>Process Name</b>	Lists the name of the master process.
<b>Status</b>	Lists the status of the master process. Active processes are available for reporting.
<b># of Master Activities</b>	Lists the number of master tasks associated with the master process.

#### 1.22.8.2 Add/Edit Master Process Page Overview

Master Processes are created to categorize and report on Master Tasks. Having master processes allows you to standardize the different types of tasks that might exist across all of your projects for reporting purposes. For more information, see [About Master Processes and Master Tasks](#). The following actions can be taken from this page:



- [Add Master Processes](#)
- [Edit Master Processes](#)

Below are descriptions of the fields and buttons located on this page.

Field	Description
Save	Click to save the master process.
Cancel	Click to disregard changes. Unsaved changes will be lost.
Process Name	Enter a name for the master process.
Process Number	Enter the process number. Master process numbers cannot be duplicated.
Status	Select a status for the master task. By default, the Active radio button is selected, which will make the task available to users. Select disabled keep this task as a draft version that can be made active later on.
Description	Enter a description for the master task.

#### 1.22.8.3 View Master Process Page Overview

This page allows you to view the details of a master process including its associated master tasks. You can also [add master tasks](#) to master processes from here. For more information, see [About Master Processes and Master Tasks](#). Below are descriptions of the fields and buttons located on this page.

Field	Description
Update	Click to make changes to the details of the master process or to the details of any of the associated master tasks.
Cancel	Click to disregard changes and navigate away from this page.

<b>Process Name</b>	Displays the name of the master process.
<b>Process Number</b>	Click the drop-down arrow to select a master process to associate this task to.
<b>Status</b>	Displays whether the master process is currently in active status or draft.
<b>Description</b>	Displays the description of the master process.
<b>Master Tasks</b>	
<b>Edit</b>	Click to edit the details of the master task.
<b>Delete</b>	Click to delete the master task.
<b>Task Name</b>	Displays the name of the master task.
<b>Type</b>	<p>Displays whether the task is an event or task.</p> <p>Although an event is still treated as a task in regards to duration, start and finish time, an event is classified as a meeting or an approval of item(s). Specifying events gives the Schedule Manager the ability to better manage the schedule by identifying when work is actually being done versus a decision making or approval process that may or may not impact the schedule.</p>
<b>Milestone</b>	A check mark appears for the items that are flagged as milestones. Milestones are tasks that are considered critically important or in the critical path of the project's success.

#### 1.22.8.4 Master Task Page Overview

This page allows you to view the details of a master task. Master tasks are a subset of master processes. They are used to identify similar project phases that may be referred to by different names across multiple projects. For example, one project might use the term, 'Closeout' and others may use 'Final Completion', 'Project Close Out' or 'Closeout/Occupancy'. The master task is a unique identifier that unifies all of these project phases so that account administrators and executives can report on the status of these phases across all projects. For more information, see [About](#)

[Master Processes and Master Tasks](#). The following actions can be taken from this page:

- [Edit Master Tasks](#)

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Update</b>	Click to make changes to the details of the master task.
<b>Cancel</b>	Click to disregard changes. Unsaved changes will be lost.
<b>Task Name</b>	Displays the name of the master task.
<b>Process Number</b>	Displays the number of the master process that this task is associate with.
<b>Task Number</b>	Displays the task number. Task numbers are unique identifiers that cannot be duplicated.
<b>Task Type</b>	Displays the type of task this is; a task or an event.  Although an event is still treated as a task in regards to duration, start and finish time, an event is classified as a meeting or an approval of item(s). Specifying events gives the Schedule Manager the ability to better manage the schedule by identifying when work is actually being done versus a decision making or approval process that may or may not impact the schedule.
<b>Milestone?</b>	Displays whether or not this task is a milestone. Such tasks are considered critically important or in the critical path of the project's success.
<b>Description</b>	Displays the description of the master task.

#### 1.22.8.5 Add/Edit Master Task Page Overview

This page allows you to add and modify master tasks. Master tasks are a subset of master processes. They are used to identify similar project phases that may be referred to by different names across multiple projects. For example, one project

might use the term, 'Closeout' and others may use 'Final Completion', 'Project Close Out' or 'Closeout/Occupancy'. The master task is a unique identifier that unifies all of these project phases so that account administrators and executives can report on the status of these phases across all projects. For more information, see [About Master Processes and Master Tasks](#).

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Save</b>	Click to save the master task.
<b>Cancel</b>	Click to disregard changes. Unsaved changes will be lost.
<b>Task Name</b>	Enter a name for the master task.
<b>Process Number</b>	Click the drop-down arrow to select a master process to associate this task to.
<b>Task Number</b>	Enter the task number in this field. Task numbers are unique identifiers that cannot be duplicated.
<b>Task Type</b>	Click to select whether or not this is a task or an event.  Although an event is still treated as a task in regards to duration, start and finish time, an event is classified as a meeting or an approval of item(s). Specifying events gives the Schedule Manager the ability to better manage the schedule by identifying when work is actually being done versus a decision making or approval process that may or may not impact the schedule.
<b>Milestone?</b>	Yes - Select to designate this as a milestone. A task that is considered critically important or is in the critical path of the project's success can be considered a milestone.
<b>Description</b>	Enter a description for the master task.

### 1.22.8.6 Calendar Exceptions Page Overview

Calendar exceptions are days that will be treated as an exception to the general rule, such as holidays that fall on typical working days. From this page you can choose particular dates and mark them as working or non-working days. Identifying these days at the onset of a project helps the schedule manager plan more effectively. In the Schedule module, the schedule manager has the opportunity to specify the days of the week that will be included in a typical work week. The following actions can be taken from this page:

- [Add Calendar Exceptions](#)

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Date</b>	Use this field to enter a date that will be saved as a working or non-working day in the list of calendar exceptions below.
<b>Working/Non-Working</b>	Click this drop-down arrow to make the selected date a working or non-working day.
<b>Add</b>	Click to add the exception date to the list of calendar exceptions below.
<b>Delete</b>	Click to delete selected dates.

### 1.22.8.7 Schedule Custom Fields Page Overview

Custom fields are fields that you define for users of the Schedule module to complete. They are used mainly for reporting on project schedules. They help you gather additional information that may not be covered in the schedule or schedule details. Although you can add schedule custom fields in the Schedule Settings, it is recommended that custom fields are added through Global Custom Fields, which will allow you to add custom fields to any e-Builder module or object. For more information on custom fields, see [About Global Custom Fields](#). The following actions can be taken from this page:

- [Add Schedule Custom Fields](#)
- [Add Schedule Custom Field Dependencies](#)

Below are descriptions of the fields and buttons located on this page.


Field	Description
<b>Reorder</b>	Click to change the order that the custom fields display. The Reorder Custom Fields page displays.
<b>Add Field</b>	Click to add new custom fields. The Add/Edit Custom Field page displays.
<b>Field Dependencies</b>	Click to add field dependencies. The Custom Field Dependencies page displays.
<b>Edit</b>	Click to make changes to custom field details. The Add/Edit Custom Fields page displays.
<b>Delete</b>	Click to make changes to custom field details. The Add/Edit Custom Fields page displays.
<b>Replace</b>	For drop-down and multiple pick fields only, click to replace an old value with the new value.
<b>Label</b>	Displays the custom field name.
<b>Data Type</b>	Displays the custom field data element.
<b>Permission</b>	Displays the custom field permission settings.
<b>Unique</b>	Displays whether or not the custom field is a unique. Unique custom fields are those that cannot be duplicated in other projects.
<b>Last Modified By</b>	Displays the name of the user that last modified the custom field record.

#### 1.22.8.8 Schedule Options Page Overview

Schedule options have two components; they allow you to determine whether or not a schedule manager is able to resave the baseline after it has been set; and gives you the ability to link the project start and target dates to the schedule. Below are descriptions of the fields and buttons located on this page.

Field	Description
Save	Click to save changes.
Cancel	Click to disregard changes. Unsaved changes will be lost.
<b>Restrict Schedule Manager from Re-Saving Baseline</b>	Select to restrict the schedule manger from being able to re-save the baseline after it has been set.
<b>Link Project Start and Target Date with Schedule</b>	Select to link the project's start and target dates to the schedule. Doing so will ensure that the project's life cycle coincides with the project schedule. But please keep in mind that if the project and schedule are linked, then changing dates in the schedule will affect project dates. This is a good option only if you want the project details date to be consistent with the schedule dates.

#### 1.22.8.9 Schedule Templates Page Overview

This page lists all available schedule templates and allows you to add new ones and make changes to existing templates. After the schedule has been finalized, the schedule manager might choose to save it as an account-wide or personal template.  Note: Only users with 'Manage Templates' permissions are able to save the template as an account setting.

Account templates are available in all projects, whether or not the schedule manager has access to those projects. Personal templates are tied to your username and will be available in any project that you have access to. Constraints are not saved to templates. Non-managers may choose to add templates to track only the tasks that pertain to them. For example, someone in the Finance department might only be concerned with master tasks and would therefore make the duration of all subtasks 0 and apply this template to all of their new projects. The following actions can be taken from this page:

- [Add Schedule Templates](#)
- [Copy Schedule Templates](#)
- [Delete Schedule Templates](#)

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Filter Templates</b>	
<b>Name</b>	Enter the name of the template(s) you want to filter for in this field.
<b>Status</b>	Click this drop-down arrow to select a status to filter by.
<b>Custom Fields</b>	Click this drop-down arrow to select a custom field to filter by. You can also type custom field keywords to filter by.
<b>Filter</b>	Click this button to filter by the criteria you've entered.
<b>Schedule Templates</b>	
<b>Add</b>	Click this button to add a schedule template.
<b>Copy</b>	Click this button to copy a schedule template.
<b>Delete</b>	Click this button to delete a schedule template.

#### 1.22.8.10 Schedule Template Details Page Overview

The following actions can be taken from this page:

- [Edit Schedule Template Details](#)
- [Import Tasks to Schedule Template](#)
- [Manually Add Tasks to Schedule Template](#)

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Edit Details</b>	Click to edit the details of the schedule template, such as the name, the active or draft status, description or template



	custom fields.
<b>Cancel</b>	Click to discard changes and close this page.
<b>Import</b>	Click to import tasks for the schedule template.
<b>Schedule Template Details</b>	
<b>Name</b>	Displays the name of the template.
<b>Description</b>	Displays the description of the template.
<b>Status</b>	Displays the active or draft status of the template. Active templates are available for use.
<b>Date Created</b>	Displays the date that the template was created.
<b>Duration</b>	Displays the duration of the task in hours, days, weeks or months.
<b>Created By</b>	Displays the name of the user that created the template.
<b>Custom Fields</b>	
If available, this section lists all schedule template custom fields.	
<b>Template Tasks</b>	
This table lists the details of the tasks saved in the template.	
<b>Delete</b>	Click to delete selected template tasks.
<b>#</b>	Displays the task number in order of how it will display on the project schedule.
<b>Task Name</b>	Displays the name of the task. Task names in bold are predecessor tasks.
<b>Duration</b>	Displays the duration of the task in days, weeks or months.
<b>Predecessors</b>	Displays the task number of the predecessor along with the start/finish abbreviation.

	For more information, see About Predecessor and Successor Tasks.
<b>Resource Role</b>	Displays the name of the resource on this task.
<b>Manager Role</b>	Displays the name of the schedule manager on this task.
<b>Appr for Date Changes</b>	Displays whether or not approval is required for changes made to the dates of this task.
<b>Appr for Completion</b>	<p>Displays whether or not approval is required before the task can be marked completed. Additional oversight might be required for tasks that are in the critical path to assure the task's completion. Available options and a description of each are listed below.</p> <ul style="list-style-type: none"> <li>- <b>No</b> - A manager's approval is not required when changes are made to the completion status of this task.</li> <li>- <b>All Changes</b> - A manager's approval is required when any change is made to the task's completion status.</li> <li>- <b>100% Only</b> - A manager's approval is only required when the task is set to 100% complete.</li> </ul>
<b>Master Task</b>	Displays the master tasks the task is grouped by. Master tasks allow you to group certain tasks so that they can be reported on.
<b>Task Type</b>	<p>Displays whether or not the task is an event or a task.</p> <p>Although an event is still treated as a task in regards to duration, start and finish time, an event is classified as a meeting or an approval of item(s). Specifying events gives the Schedule Manager the ability to better manage the schedule by identifying when work is actually being done versus a decision making or approval process that may or may not impact the schedule.</p>
<b>Save</b>	Click to save changes.
<b>Cancel</b>	Click to disregard changes.

### Add Template Task

Use this section to add tasks to the template one task at a time. Alternatively, you can [import tasks to the template](#) using a .mpp file. Imported tasks will be appended to existing tasks. For more information, see [Update Schedule Templates via Import](#).

<b>Task Name</b>	Enter the name of the task in this field.
<b>Choose where to add the task</b>	Choose the order in which you want this task to occur: <ul style="list-style-type: none"> <li>• Add as a last task in the schedule.</li> <li>• Add as a subtask of [choose predecessor task].</li> <li>• Insert above [choose task that will follow this one].</li> <li>• Insert below [choose task that will precede this one].</li> </ul>
<b>Task Type</b>	Select whether this is a task or event.
<b>Duration</b>	Enter the amount of days, weeks, or months this task will take to complete.
<b>Master Task</b>	Select the Master Task.
<b>Description</b>	Enter a description to give the Schedule Manager more information about the task.
<b>Predecessors</b>	Enter the task number of the predecessor task. The predecessor task is a task that must be completed before another task can begin. For information, see About Predecessor Tasks. The proper syntax for this field is the task number + start/finish abbreviation.
<b>Resource Role</b>	Select the name of the person that will be responsible for overseeing this task.
<b>Manager Role</b>	Select the name of the schedule manager.
<b>Approval Required for Date Changes</b>	Select this check box to require approval on changes made to the dates associated with this task.

<b>Approval Required for Work Complete Changes</b>	<p>Select this check box to require approval on changes made to work that has already been marked completed. The options that you can include and a description of each are listed below:</p> <ul style="list-style-type: none"> <li>- <b>No</b> - A manager's approval is not required when changes are made to the completion status of this task.</li> <li>- <b>All Changes</b> - A manager's approval is required when any change is made to the task's completion status.</li> <li>- <b>100% Only</b> - A manager's approval is only required when the task is set to 100% complete.</li> </ul>
<b>Set Task as a Milestone?</b>	<p>Select this check box to set this task as a milestone in your schedule. Identifying milestones increase the value of Schedule reports.</p>

## 1.23 Submittals

### 1.23.1 Access Submittal Settings

e-Builder Administrators can modify submittal settings in the e-Builder Administration Tools section located in the Setup.

To access the submittal settings:

1. Click **Setup**.
2. In the **Administration Tools** menu, expand **Submittals**. All of the submittal setting options display.

### 1.23.2 Access Submittal Register Page

To access the Submittal Register Page:

1. Go to Submittal Settings. For instructions, see [Access Submittal Settings](#).
2. Expand **Submittal Options**.
3. Click **Submittal Register**. The Submittal Register Options page displays.

### 1.23.3 About the 'Hide Comments and Attachments' Feature

**Warning:** Please be aware that this is a one-time change that cannot be reverted. Once you turn this setting on, it cannot be turned off. Therefore, we encourage you to read the following documentation thoroughly to understand the impact it will have on your submittal management process before enabling.

The 'Hide Comments and Attachments' feature is an account setting that if enabled, will hide all comments and attachments made by the submittal coordinator or any reviewers from the general contractor until they are made visible at the submittal coordinator's discretion. Restricting certain comments and attachments from the contractor can help bypass potential confusion should the contractor become aware of drawings and specs that are not yet finalized. Using this feature allows you to take a preemptive approach that ensure only finalized attachments and comments are visible to the GC at every stage of the submittal process. When enabled, submittal coordinators will see an option to "Show" comments and attachments next to each available item.

File Name	Attached By	Date Attached
Franklin Charter School - First Floor Specifications.pdf (1) <small>Properties   Download   Redline   Stamp   Attach Revision   Remove</small>	Cody, Zakai	01.08.2014

Before sending items back to the contractor, coordinators will have to review each comment and attachment and determine whether or not to show it in their response to the GC. If all comments and attachments are hidden, a message will appear before sending, informing them of this. This will give coordinators an opportunity to go through all comments and attachments and choose the ones to make visible to the GC.

**Warning**  
All comments and attachments are currently hidden from review. If you would like to make comments and/or attachments visible to the general contractor, please click Cancel, and then click the Show link next to the comment or attachment.

It's important to effectively communicate the implications of this setting to pertinent members of your organization so they understand how it will affect their submittal review process. This is especially true for submittal coordinators, as they will have a new step they will need to follow in their process of responding to submittal items. In short, here are some of the main things to keep in mind:

- By default, comments and attachments will be hidden from the GC until they are made visible by the submittal coordinator.
- Submittal coordinators will have to go through each comment and attachment and decide which to make visible to the GC.

## Using 'Show/Hide Comments and Attachments' in Conjunction with Private Comments

If you are currently using the Private Comments feature in submittals, it is important to note that when used in conjunction with 'show/hide comments and attachments,' both conditions have to be met for the desired action to take effect. For instance, if a submittal coordinator includes a comment in the review, but it is marked private, the general contractor will not be able to see the comment unless the role he/she belongs to is included in the list of roles able to view private comments.

**Manage Private Comments - Submittals**

Manage Private Comments Save Cancel

Who can view/add private comments:

**All Roles**


- Activity Manager
- Admin
- Equipment Managers
- General Contractor
- Project Manager
- Schedule Manager
- Subcontractor
- Task Manager
- Task Resource

**Selected Roles**

- A/E Sub
- Architect/Engineer

Set comments to 'Private' by default:

Save Cancel

 **Note:** The Private Comments setting is accessible by going to Setup > Submittal Options > Private Comments.



## 1.23.4 Managing Submittal Settings

### 1.23.4.1 Manage Submittal Permissions

Submittal permissions affect how users interact with the system. These settings should be applied before the start of the submittal process to ensure all users are able to perform their expected duties. The Submittal module has two permission levels. A brief description of each is below:

Submittal Permissions	Description
<b>View Submittals</b>	User can only view submittal items; they cannot make any modifications. This permission is typically given to subcontractors and reviewers or to the sub-consultants of the submittal coordinator.
<b>Add/Edit Submittals</b>	User can add and edit submittal items. This permission level is intended for the general contractor. With this permission level, user is also able to add/remove submittal items, import a submittal register, create a submittal package, and attach documents to submittals as needed.

### Manage Submittal Permissions

1. From the Top Navigation Tabs, click **Setup**.
2. Expand **Users**.
3. Click **Permissions By User**. Individual users are listed in the table.
4. Click the name of the user whose permissions you'd like to change.

5. Click the **Submittals** tab.
6. From this page you can assign submittal permissions by role or by user. In either section, select the check box(es) for the permission settings you'd like to assign.
7. Click **Save Changes**.

#### 1.23.4.2 Allow Editing of System-Generated Dates

e-Builder automatically tracks and keeps a log of all user interactions within the system. A record of every transaction is captured and ultimately, reports can be generated based on this data. By default, the **Allow System Generated Submittal Dates to be Modified** option is not selected. Enabling this feature allow users with Add/Edit Submittal permissions to modify the dates items were submitted for review, as well as review completion dates. Although this setting allows date changes, a history of these changes are also tracked in e-Builder. The date changes were made and by whom can still be obtained through history logs and reporting. You may want to allow the modification of system generated dates if the submittal approvals and updates occur outside of e-Builder. In such a case, updates are manually entered by an e-Builder user.

To allow system generated submittal dates to be modified:

1. Go to Submittal Settings. For instructions, see [Access Submittal Settings](#).
2. Expand **Submittal Options**.
3. Click **Settings**.
4. Select the **Allow System Generated Submittal Dated to be Modified** checkbox.
5. Click **Save**.

#### 1.23.4.3 Add New Submittal Statuses

To add a new submittal status:

1. Enter the name of the new status in the **Status** field.
  2. Enter a status prefix in the **Prefix** field.
  3. Click **Add**. The new status appears in the **Status** table.
-



#### 1.23.4.4 Enable Private Comments

Enabling private comments allow you to assign the roles that can view/add private comments.

To enable private commenting:

1. Go to Submittal Settings. For instructions, see [Access Submittal Settings](#).
2. Expand **Submittal Options**.
3. Click **Private Comments**. The Manage Private Comments - Submittals window displays
4. In the **All Roles** section, select the role(s) you want to give permission to view/add private comments, and then click the right directional arrow to add them to the adjacent box.
5. Select the **Set comments to 'Private' by default** check box to automatically make comments entered by the selected roles private.  
Or  
Clear this check box to allow their comments to be public by default and give them the opportunity to make the comment private on a case-by-case basis.
6. Click **Save**.

Related Topics:

- [Private Comments Page Overview](#)

#### 1.23.4.5 Add Submittal Item or Submittal Package Custom Fields

To add custom fields for a submittal item or a submittal package:

1. Go to Submittal Settings. For instructions, see [Access Submittal Settings](#).
2. Expand **Custom Fields**.
3. Click **Submittal Item** or **Submittal Package**.
4. Click **Add Field**.

5. Select a data type, and then click **Next**.
6. On the **Custom Field Details** page, enter a name for the custom field in the space provided after **Field Label**.
7. Click **Next**.
8. Review the details of the custom field.
9. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

Or

If details are correct, click **Save**.

### 1.23.4.6 Submittal Status Options

#### 1.23.4.6.1 About Submittal Status Options

Statuses are configured to give the submittal coordinator the ability to set the status of each submittal item in the register. As submittal packages are routed to the design submittal coordinator they in turn can set the status of each item associated to the package and add notes/markups as needed.

The following tasks will help you manage submittal status options:

- [Add New Submittal Statuses](#)
  - [Edit Existing Submittal Statuses](#)
  - [Delete Existing Submittal Statuses](#)
  - [Use Default Submittal Statuses](#)
  - [Manage Package Statuses](#)
-

---

#### 1.23.4.6.2 Add New Submittal Statuses

To add new submittal statuses:

1. Go to the Submittal Register Options page. For instructions, see [Access Submittal Register Page](#).
2. Enter the name of the new status in the **Status** field.
3. Enter a status prefix in the **Prefix** field.
4. Click **Add**. The new status appears in the **Status** table.

#### 1.23.4.6.3 Edit Existing Submittal Statuses

To edit a submittal status:

1. Go to the Submittal Register Options page. For instructions, see [Access Submittal Register Page](#).
2. Click the **Edit** link located left of the item you wish to modify.
3. The Status Name, Description, and Prefix fields are now editable. Type your revisions, and then click **Save** (In edit mode, the Save link replaces the Edit link).

#### 1.23.4.6.4 Delete Existing Submittal Statuses

To delete an existing submittal status:

1. Go to the Submittal Register Options page. For instructions, see [Access Submittal Register Page](#).
2. Select the check box next to the status(es) you wish to delete.
3. Click **Delete**.

#### 1.23.4.6.5 Use Default Submittal Statuses

Default Submittal Statuses are as follows:

- Approved
  - Approved As Noted
  - For Record Only
  - On Hold
  - Rejected
  - Revise
  - Revise & Resubmit
-

- \*New

\*New is the only status that cannot be deleted or modified. All submittal items when added to a submittal package start with a status of NEW until updated by a user with approve submittal permission.

To use default submittal statuses:

1. Go to the Submittal Register Options page. For instructions, see [Access Submittal Register Page](#).
2. click the **Use Defaults** button.

#### 1.23.4.6.6 Manage Package Statuses

There are two ways to manage the submittal package statuses: by enabling the track package status feature and by setting a precedence for each status.

To manage the statuses of submittal packages:

1. Go to the Submittal Register Options page. For instructions, see [Access Submittal Register Page](#).
  2. Click the **Manage Package Status** button.
  3. On the Package Status Option page, select the **Track Package Status** checkbox to enable this feature.
  4. In the **Status Precedence Box**, select the status whose precedence you wish you change.
  5. Use the controls to the left of this box ( Top, Up, Down, Bottom) to change the position of each status.
  6. Repeat steps 3 and 4 for each status whose precedence you wish to change.
  7. Click **Save**.
  8. A confirmation message displays, warning that all open submittal packages will be updated based on the new precedence order. Click **Continue** to confirm the change.
-

### 1.23.4.7 Submittal Categories

#### 1.23.4.7.1 About Submittal Categories

Submittal categories are mainly used for reporting purposes. For example, you might want to run a report that shows all the outstanding shop drawing submittals in the last month. If the shop drawings category is created, the report will only show those results.

The following tasks will help you manage submittal categories:

- [Add New Submittal Categories](#)
- [Edit Existing Submittal Categories](#)
- [Delete Existing Submittal Categories](#)
- [Use Default Submittal Categories](#)

#### 1.23.4.7.2 Add New Submittal Categories

To add a new submittal category:

1. Go to the Submittal Register Options page. For instructions, see [Access Submittal Register Page](#).
2. Click the **Category Options** tab.
3. Enter the name of the new category in the **Category** field.
4. Click **Add**. The new category appears in the **Categories** table.

#### 1.23.4.7.3 Edit Existing Submittal Categories

To edit existing submittal categories:

1. Go to the Submittal Register Options page. For instructions, see [Access Submittal Register Page](#).
2. Click the **Category Options** tab.
3. Click the **Edit** link located left of the item you wish to modify.
4. The Category Name and Description fields are now editable. Type your revisions, and then click **Save** (In edit mode, the Save link replaces the Edit link).

#### 1.23.4.7.4 Delete Existing Submittal Categories

To delete a submittal category:

1. Go to the Submittal Register Options page. For instructions, see [Access Submittal Register Page](#).
2. Click the **Category Options** tab.
3. Select the check box next to the status(es) you wish to delete.
4. Click **Delete**.

#### 1.23.4.7.5 Use Default Submittal Categories

Default Submittal Categories are as follows:

- As-Builts
- Bid Submittals
- Certification
- Mock Up
- Operation/Maintenance Manual
- Product Data
- Sample
- Shop Drawing

To use default submittal categories:

1. Go to the Submittal Register Options page. For instructions, see [Access Submittal Register Page](#).
2. Click the **Category Options** tab.
3. Click the **Use Defaults** button.

### 1.23.4.8 Submittal Package Layouts

#### 1.23.4.8.1 About Submittal Package Layouts

Submittal Package Layout options allow you to define the columns on the Submittal Package page. Custom layouts benefit users by allowing them to view only the information that is pertinent to them with the option of viewing additional information when necessary. Consolidating this information facilitates reporting, viewing, and tracking. Multiple layouts can be created to serve different purposes.

Below is a list of procedures for managing submittal package layouts:

- [Add Submittal Package Layouts](#)
-

- [Delete Submittal Package Layouts](#)
- [Color Code Submittal Package Layouts](#)
- [Set Threshold Values](#)

#### 1.23.4.8.2 Add Submittal Package Layouts

To add submittal package layouts:

1. Go to Submittal Settings. For more information, see [Access Submittal Settings](#).
2. Click **Submittal Package Layouts**. The Submittal Package Layouts page displays.
3. Click **Add**. The **Manage Submittal Package Columns** screen displays.
4. In the **Layout Name** field, enter a name for the layout. A list of all the columns located on the Submittal Package screen displays in the box on the left.
5. Select the columns you wish to add to the layout.
6. Click **Add**.
7. Repeat steps 3-4 for all the desired columns.
8. Use the controls on the right side of the screen (**Top, Up, Down, and Bottom**) to order the columns as they will display in the layout.
9. Click **Save**.

#### 1.23.4.8.3 Delete Submittal Package Layouts

To delete submittal package layouts:


1. Go to Submittal Settings. For instructions, see [Access Submittal Settings](#).
  2. Click **Submittal Package Layouts**. The Submittal Package Layouts page displays.
  3. Click the check box next to the layout(s) you wish to delete.
  4. Click **Delete**. A confirmation message appears.
  5. Click **Continue**.
-

## 1.23.4.8.4 Color Code Submittal Layout Columns

Color coding can help specific sets of information stand out at a glance. If there are information sets that are more important to a user than others, color coding those columns helps you quickly and easily identify this information.

To color code submittal layout columns:

1. Go to Submittal Settings. For instructions, see [Access Submittal Settings](#).
2. Click **Submittal Package Layouts**. The Submittal Package Layouts page displays.
3. Click the **Color Codes** link located left of the Layout name. The **Color Codes Settings** page displays.
4. Select the check box next to the column(s) you wish to color code.

 **Note:** The row must be checked to enable color coding.

5. In the **Apply To** column, select **Text** or **Background**.
6. Click the **Low Range Color** drop-down list and choose a color for that column.
7. To continue coding for all columns - those that are not in the selected layout - click the **Show all columns** check box located toward the top of the screen.
8. Click **Save**.

Related Topics:

- [Set Threshold Values](#)

## 1.23.4.8.5 Set Threshold Values

In the Submittal module, thresholds can only be applied to submittal statuses. Setting thresholds is another way to identify important sets of information, but thresholds differ from simple color coding because it allows you to assign minimum, mid range, and high range numerical values for each submittal status. Color codes are assigned to each threshold value to serve as a visual indicator when submittal statuses have reached or surpassed certain thresholds. Thresholds have to be enabled in order to display on the Submittal Package page. Enable the threshold feature by selecting the Enable Threshold check box located toward the top of the page. This feature can be disabled at any time.

**Example:**

Threshold values might be set for the Approved submittal status. The column may

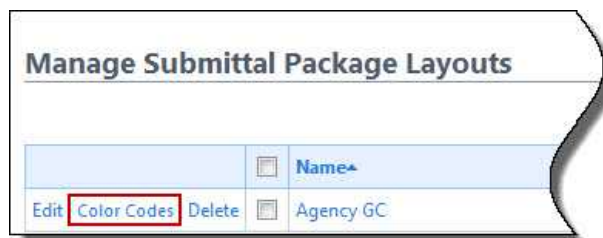
---



display in red if the value is zero and displays in green if the value is a number greater than zero. This way, the contractor or owner can see at a glance the number of submittal packages that have been approved and how many have not.

**Note:** In the Submittal module, thresholds can only be applied to submittal statuses. To see additional columns, click the Show all Columns checkbox located toward the top of the page. Also, the row must be checked to enable the color code and threshold features.

1. Go to Submittal Settings. For instructions, see [Access Submittal Settings](#).
2. Click **Submittal Package Layouts**. The Manage Submittal Package Layouts page displays.
3. Click the color codes link located on the left side of the layout name.



The Color Codes page displays.

4. Select the **Enable Threshold** checkbox located in the header. Threshold drop-down arrows display with empty fields into which you can enter numeric values.

Column Name	Apply To	Enable Threshold	Low Range Color	Low-Mid Threshold	Mid Range Color	Mid-High Threshold	High Range Color
Title	<input type="radio"/> Text <input type="radio"/> Background	<input type="checkbox"/>	Red				
Revision Number	<input type="radio"/> Text <input type="radio"/> Background	<input type="checkbox"/>	Red				
Status	<input type="radio"/> Text <input type="radio"/> Background	<input type="checkbox"/>	Red				
Held By	<input type="radio"/> Text <input type="radio"/> Background	<input type="checkbox"/>	Red				
Approved	<input type="radio"/> Text <input checked="" type="radio"/> Background	<input checked="" type="checkbox"/>	Red	0.00	Yellow	15.00	Green
Rejected	<input type="radio"/> Text <input type="radio"/> Background	<input checked="" type="checkbox"/>	Red		Yellow		Green
Approved As Noted	<input type="radio"/> Text <input type="radio"/> Background	<input checked="" type="checkbox"/>	Red		Yellow		Green
Revise	<input type="radio"/> Text <input type="radio"/> Background	<input checked="" type="checkbox"/>	Red		Yellow		Green
Revise & Resubmit	<input type="radio"/> Text <input type="radio"/> Background	<input checked="" type="checkbox"/>	Red		Yellow		Green

Note:


1. Color coding will be enabled only for checked rows.
2. For enabled rows, please enter at least one threshold value.
3. Low-mid threshold value must be less than or equal to the mid-high threshold value.

5. Select the 'Enable Threshold' check box of the individual column name that you want to enable color codes for.
6. Enter the threshold numerical values and select a color code for each value.


7. After all threshold values have been assigned, click **Save**.

### 1.23.4.9 Submittal Mail Merge Templates

#### 1.23.4.9.1 Add Submittal Mail Merge Templates

 **Tip:** It is recommended that you download the default Submittal Template to start with. Although this template can be modified, the default is complete with all necessary field mappings. Having a template on file also gives you the ability to make necessary changes as they arise, without having to start over from scratch.

1. Go to Submittal Settings. For instructions, see [Access Submittal Settings](#).
2. Click **Mail Merge Templates**. The Mail Merge Template page displays.
3. To make changes to the default template, click the **Download Default Submittal Template** link.
4. Save this document locally and make any necessary changes.
5. On the Mail Merge Templates page, click **Add New Template**. The **Mail Merge Template Details** page displays.
6. Complete all required fields:
  - Template Name
  - Make template Active (available for use) or Draft
  - Set output type (Word or PDF)
7. Click **Browse** to search for and upload the default submittal template saved in step 4.
8. In the **Project Assignments** section, select the project(s) that you'd like to assign the template to.
9. Click **Add**. The selected project(s) is added to the box on the right.

 **Note:** If you do not specify the project(s) that will use this template, the template will be available in all projects.

10. Click **Save**.

#### 1.23.4.9.2 Edit Submittal Mail Merge Templates

To edit submittal mail merge templates:

1. Go to Submittal Settings. For more information, see [Access Submittal Settings](#).
-

2. Click **Mail Merge Templates**. The Mail Merge Template page displays.
3. Click the title of the template.
4. Click **Edit**. The Edit Mail Merge Template page displays.
5. Make any or all of the modifications listed below.
  - Change template name
  - Add/Remove/Edit template description
  - Change status - Make template Active (available for use) or Draft
  - Change output type - Export documents to Word or PDF format
  - Change template file - Upload a new mail merge template
  - Assign template to projects
6. Click **Save**.


## 1.23.5 Submittal Settings Page Overview

### 1.23.5.1 Submittal Settings Page Overview

This page allows you to enable or disable the ability for users to modify the following system-generated dates: Date Submitted for Review, Date Review Completed, Consultant Review Complete Date. The other setting on this page, 'Allow Comments and Attachments to be hidden from Review' may or may not be available to you. If it is, it is important to note that it is a one-time setting change that cannot be disabled, once it is turned on. When enabled, all comments and attachments between the submittal coordinator and reviewers will be hidden from the GC by default. For more information on this particular feature, see [About the 'Hide Comments and Attachments' Feature](#).

A description of the fields and buttons located on this page is provided in the table below.

Field	Description
<b>Save</b>	Click to save changes.
<b>Cancel</b>	Click to discard changes and return to the main Setup page.
<b>Allow System Generated Submittal Dates to be Modified</b>	Select the check box and click save to allow system generated submittal dates to be modified.

<p><b>Allow Comments and Attachments to be Hidden from Review</b></p>	<p> <b>Warning:</b> This is a one-time change. Once this setting is enabled, it can not be disabled. Please see <a href="#">About the 'Hide Comments and Attachments' Feature</a> for more information.</p> <p>Select the check box and click save to allow comments and attachments to be hidden from the general contractor.</p>
---	---

### 1.23.5.2 Submittal Package Page Overview

Submittal package settings impact the way packages are ordered, configured and searched for in e-Builder. These settings directly influence the task of Creating a Submittal Package. There are three submittal package settings. An overview of each setting is described below:

Submittal Package Settings	Description
<p><b>Use CSI List</b></p>	<p>Click the drop-down list to choose whether or not submittal packages should use CSI codes. This is an account level setting that applies to all projects in the account. Whether this feature is set to yes, or no, users can still enter free-form text into this field.</p> <p><b>Yes</b> is the default value. When CSI codes are used, they represent the second set of numbers in the submittal package number.</p> <p><b>No</b> will effectively remove the second Submittal Package setting option below: <b>CSI List to Use</b>. While creating a submittal package, the CSI Codes drop-down list will not display on the Submittal Package page if this feature is set to No. However, a space will be provided for users to enter a second set of numbers in the Submittal Package # field. Free-form text entry is allowed, or the field may be left blank for a two digit set submittal package number.</p>
<p><b>CSI List to Use</b></p>	<p>This option only displays if <b>Yes</b> is selected in the <b>Use CSI List</b> option above. Click the drop-down arrow to select a CSI format. Available options include:</p>

	<ul style="list-style-type: none"> <li>• CSI MasterFormat 1995</li> <li>• CSI MasterFormat 2004</li> <li>• CSI MasterFormat 2012</li> <li>• User Defined List</li> </ul> <p><b>Best Practice</b></p> <p>If <b>User Defined List</b> is selected it's important to ensure that the list is manageable. Plan ahead to make sure all necessary codes are available.</p>
<b>Auto Numbering Packages</b>	<p><b>Per Code</b> – Choose this option to automatically number submittal package records in sequential order (1, 2, 3, etc.), by division.</p> <p><b>Example:</b> All submittal packages in division one are numbered in sequential order. All submittal packages in division two are numbered in sequential order, and so forth.</p> <p><b>Per Project</b> – Choose this option to automatically number submittal package records in sequential order (1, 2, 3, etc.), regardless of division.</p> <p><b>Example:</b> Submittal packages are numbered sequentially in the order they are created regardless of division.</p>

### 1.23.5.3 Submittal Register Options Page Overview

This page allows you to configure the status options that will be used by the submittal coordinator during the review process. Default options are available, but you're also able to enter custom statuses. Category options are also configurable from this page. Each submittal item must be classified by a category, which you will define here. Default options are available, but you're also able to enter custom categories that the general contractor will use while they enter items into the system either via import or individually.

The following tasks will help you manage submittal status options:

- [Add New Submittal Statuses](#)

- [Edit Existing Submittal Statuses](#)
- [Delete Existing Submittal Statuses](#)
- [Use Default Submittal Statuses](#)
- [Manage Package Statuses](#)

The following tasks will help you manage submittal categories:

- [Add New Submittal Categories](#)
- [Edit Existing Submittal Categories](#)
- [Delete Existing Submittal Categories](#)
- [Use Default Submittal Categories](#)

A description of the fields and buttons located on this page is provided in the table below.

Field	Description
<b>Status Options Tab</b>	
<b>Add</b>	Click to add a new status options.
<b>Cancel</b>	Click to discard changes.
<b>Status</b>	Enter the name of the new status.
<b>Prefix</b>	Enter an abbreviation for the status.
<b>Description</b>	Enter a description for the status.
<b>Requires Revision</b>	Select this check box if revisions will be required when this status is selected.
<b>For Record Only</b>	Select this check box if this status should be used only for items that you simply need to have a record for, but do not need approved. Use cases for this type of status may vary, but one example might be for an item that was installed, but should not have been. The owner and the GC may have come to an agreement on the item and settled any issues, but to have a record of this case, the item's status may be set to 'Rec Only.'

<b>Auto-Close Status</b>	Select this check box if this status will automatically mark the item closed. Although this is an account setting, it can be enabled or disabled at the project level by general contractors or an administrator. For more information, see Submittal Settings Page Overview.
<b>Manage Package Status</b>	Click to open the Manage Package Status page and determine whether or not statuses can be tracked and also to set the order in which the statuses will appear in the user interface.
<b>Use Defaults</b>	Click to use the following list of default statuses: <ul style="list-style-type: none"> <li>• App - Approved</li> <li>• AAN - Approved as Noted</li> <li>• FRO - For Record Only</li> <li>• ONH - On Hold</li> <li>• REJ - Rejected</li> <li>• REV - Revise</li> <li>• RAR -Revise &amp; Resubmit</li> </ul>
<b>Delete</b>	Click to deleted selected statuses.
<b>Edit</b>	Click this link to make changes to the status.
<b>Delete</b>	Click this link to delete the status.
<b>Status Name</b>	This column displays the name of the status.
<b>Description</b>	This column displays the description of the status.
<b>Prefix</b>	This column displays the abbreviation of the status.
<b>Req. Rev</b>	A check mark in this column indicates that when this status is used, a revision will automatically be required.
<b>For Rec. Only</b>	A check mark in this column indicates that this status is for record purposes only. Such as status might only be used for items that you simply need to have a record for, but do not need approved. Use cases for this type of status may vary, but one example might be for an item that was installed, but should not have been. The owner and the GC may have

	come to an agreement on the item and settled any issues, but to have a record of this case, the item's status may be set to 'Rec Only.'
<b>Auto-Close Status</b>	A check mark in this column indicates that when this status is selected, it will automatically close the item. Although this is an account setting, it can be enabled or disabled at the project level by general contractors or an administrator. For more information, see Submittal Settings Page Overview.
<b>Category Options Tab</b>	
<b>Add</b>	Click to add a new status options.
<b>Cancel</b>	Click to discard changes.
<b>Category</b>	Enter the name of the new category.
<b>Description</b>	Enter a description for the category.
<b>Use Defaults</b>	Click to use the following list of default categories: <ul style="list-style-type: none"> <li>• As-Built</li> <li>• Bid Submittals</li> <li>• Certifications</li> <li>• Mock Up</li> <li>• Operation/Maintenance</li> <li>• Product Data</li> <li>• Sample</li> <li>• Shop Drawing</li> </ul>
<b>Delete</b>	Click to delete selected categories.
<b>Edit</b>	Click this link to make changes to the category.
<b>Delete</b>	Click this link to delete the category.
<b>Category Name</b>	This column displays the name of the category.
<b>Description</b>	This column displays the description of the category.



#### 1.23.5.4 Private Comments Page Overview

This page allows you to select the roles that are able to view and add private comments. When private comments are enabled, only the roles in the defined list will be able to view and make comments private. For instructions, see [Enable Private Comments](#).

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Save</b>	Click to save changes.
<b>Cancel</b>	Click to discard changes and return to the main Setup page.
<b>Who can view/add private comments</b>	Select the roles that can view/add private comments.
<b>Set comments to 'Private' by default</b>	Select this check box to make comments entered by the selected roles private by default. Only users in the selected roles will be able to see these comments.  Clear this check box to allow their comments to be public by default and give them the opportunity to make the comment private on a case-by-case basis.

#### 1.23.5.5 Manage Submittal Package Layout Page Overview

Submittal Package Layout options allow you to define the columns on the Submittal Package page. Custom layouts benefit users by allowing them to view only the information that is pertinent to them with the option of viewing additional information when necessary. Consolidating this information facilitates reporting, viewing, and tracking. Multiple layouts can be created to serve different purposes.

Below is a list of procedures that will assist you with managing submittal package layouts:

- [Add Submittal Package Layouts](#)
- [Delete Submittal Package Layouts](#)
- [Color Code Submittal Package Layouts](#)
- [Set Threshold Values](#)

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Add</b>	Click to save changes.
<b>Delete</b>	Click to discard changes and return to the Manage Submittal Package Layouts page.
<b>Columns</b>	
This section allows you to create submittal package columns for your layouts.	
<b>All Columns</b>	Displays a list of all the columns that can be added to the submittal package layout.
<b>Selected Columns</b>	Displays the columns that will be display in the submittal package layout.

#### 1.23.5.6 Submittal Mail Merge Templates Page Overview

Mail merge templates allow you to extract data from e-Builder and export it into a Microsoft Word® or Adobe PDF® document. This eliminates the need to enter information into a Word document manually and reduces the margin for error. In the Submittal module, mail merge templates can be created for submittal items or submittal packages. These templates are used in a number of ways. When generating a transmittal, you can do so based on any of the mail merge templates you've created. Having a system-generated document ensures the integrity of your data and it's a quick and easy way to consolidate information you've already entered once, in a ready-to-read format.

Below is a list of procedures for working with submittal mail merge templates:

- [Add Submittal Mail Merge Templates](#)
- [Edit Submittal Mail Merge Templates](#)

Below are descriptions of the fields and buttons located on this page.

Field	Description
<b>Add</b>	Click to add submittal package layouts and define the columns

	on the Submittal Package page.
<b>Delete</b>	Select one or more submittal package layout and click the delete button to remove the layouts.
<b>Name</b>	Displays the name of the submittal package layout.
<b>Last Modified by</b>	Displays the name of the user who last modified the submittal package layout.
<b>Date Last Modified</b>	Display the date in which the submittal package layout was last modified.
<b>Edit</b>	Click to modify the submittal package layout.
<b>Color Codes</b>	Click to color code columns in the submittal package layout.
<b>Delete</b>	Click to remove the submittal package layout.

## 1.24 Users

### 1.24.1 About Managing Users

User settings allow account administrators to manage all aspects of a user's account. From here you will be able to add users, create roles, manage project access and permission levels. All account participants that will be contributing to your projects should be added as account users, which can be completed by account administrators and those with 'Manage User' permission.

A person's ability to perform tasks is based on their permissions. Although you can technically grant permissions to individual users, as a best practice, permissions should be managed by account or project role roles; i.e. Project Managers, Accountants, General Contractors, Consultants, etc. Roles are defined by account administrators, and should represent the actual roles that exist throughout your organization. As people join, leave and change positions throughout your organization, maintaining their level of access is easiest if managed by account or project roles. Managing permissions in this manner streamlines auditing and permission management.

Within e-Builder are the concepts of account roles and project-level roles. Account roles are the highest level at which permissions are granted. Account roles should be created for every role that will be used throughout all of your projects.

Members of an account role will have the permissions of that role on every account that they have access to. Project-level roles on the other hand allow you to diversify the permissions of a role from project to project. To learn more, see [Account Role Management](#). The following topics will assist you with managing users:

- [Add New Users to Account](#)
- [Add New Account Roles](#)
- [Add Users to Account Roles](#)
- [Add Users Project Roles](#)

Related Topics:

- [About Project Level Roles](#)

### 1.24.2 Access Users Settings

To access the Users Settings:

1. Click the **Setup** link.
2. In the **Administration Tools** section, click **Users**.

### 1.24.3 Access Manage Users Page

To access the Manage Users page:

1. Click the **Setup** link.
2. In the **Administration Tools** section, click **Users**.
3. Click **Manage Users**.

### 1.24.4 Account Role Management

In e-Builder, users are able to perform certain tasks based on the permissions that have been given to them. While you are able to give individual permissions in some modules, as a best practice, we recommended setting permissions per role instead.

---

This will maximize the efficiency of your audits and help you better manage user permissions across the account.

## Account Roles vs. Project Roles

Roles come in two tiers. There are account roles and project level roles. All the roles that need to be available in your projects must exist at the account level, such as Accounting, Administrative Assistants, Project Managers, General Contractors, etc. However, to customize the permissions of a role from project to project, you must add users to those roles at the project level, but they must not be in that role at the account level. For more information, see [About Project Level Roles](#).

In short, create all of the roles that you will need at the account level. Whether or not you add users to those roles will be based on whether or not you want the users in that role to have account level permissions, or project-level permissions.

The following tasks will help you manage roles:

- [Add New Account Roles](#)
- [Add Users to Account Roles](#)

## 1.24.5 Manage Users

### 1.24.5.1 Run User Adoption Report

This task can be completed by:

- *Account Administrators*

User adoption reports can be run at any time. They allow you to view stats on how frequent users are logging into e-Builder.

To run a user adoption report:

1. Go to the Manage Users page. For instructions, see [Access Manage Users Page](#).
2. Click **User Adoption Report**. The User Adoption Report page displays.
3. By default, the date range for the previous month populates the date fields. If necessary, adjust the date fields accordingly.
4. Click **Run Report**. Results appear in the table below.

5. Optionally, you can:
  - Print the report
  - Export the report to an Excel spreadsheet

Related Topics:

- [User Adoption Report Page Overview](#)

### 1.24.5.2 Add Existing Users

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Manage User' Permission*

Adding existing users refers to adding an already licensed e-Builder user who has access to another account. Doing so will help you avoid having to create a new user profile. After users have been copied over, you must place them in the appropriate roles and give them project access before they are able to begin working in their projects.

**Warning:** If the user is configured to be hidden in the global directory, they are restricted from being added to multiple accounts. These participants will not show up in the list of available users. This setting is can be managed from the [User Details](#) page.

To add existing users:

1. Go to the Manage Users page. For instructions, see [Access Manage Users Page](#).
  2. Click **Add Existing User**. The Add Existing User page displays.
  3. Enter the person's name and/or username and company affiliation to find them in the directory, and then click **Filter**.
  4. Select the check box next to the user's name and click **Add User(s)**. You are redirected to the Manage Users page and the new user appears in the Users table below.
-

Related Topics:

- [Add Users to Account Roles](#)
- Add Project Members
- Manage Project Member Permissions
- [About Project Level Roles](#)
- [Add User to Project Roles](#)

### 1.24.5.3 Add New Users to Account

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Manage User' Permission*

To add new users to the account:

1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
2. Click **Manage Users**.
3. Click **Add New User**. The [Add New User page](#) displays.
4. Complete all necessary fields.
5. Click **Save**.

Related Topics:

- [Add Users to Account Roles](#)
  - Add Project Members
  - Manage Project Member Permissions
  - [About Project Level Roles](#)
  - [Add User to Project Roles](#)
-

#### 1.24.5.4 Edit User Details

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Manage User' Permission*

A user's record includes their profile data, such as their name, email address and username as well as business information. In addition to this, there are a few access settings that are subject to modification, like a user's license type, the ability to restrict their access to documents only and whether or not the person can be added to multiple accounts. For a description of each setting, see [Add/Edit User Page Overview](#).

To edit the details of a user's records:

1. Go to the Manage Users page. For instructions, see [Access Manage Users Page](#).
2. Click the user's name. The User Details page displays.
3. Click **Edit**.
4. Make all necessary changes.
5. Click **Save**.

#### 1.24.5.5 Add User Custom Fields

**This task can be completed by:**

- *Account Administrators*

User custom fields are fields that can be defined by account administrators and they allow you to gather additional information that is not inherent in e-Builder. This data is then used to generate reports. Custom fields are prevalent in all modules. To learn more, see [About Global Custom Fields](#).

To add User custom fields:

1. Go to Users settings. For instructions, see [Access Users Settings](#).
  2. Click **User Custom Fields**.
  3. Click **Add Field**.
  4. Select a data type, and then click **Next**. The **Custom Field Details** page
-



displays.

5. Complete all necessary fields.
6. Click **Next**.
7. Review the details of the custom field.
8. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

Or

If details are correct, click **Save**.

Related Topics:

- [Add/Edit Custom Field Page Overview](#)

#### 1.24.5.6 Add Users to Project Roles

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Manage Membership' Permission*


To diversify someone's permissions from project to project, you can apply the permissions of their role to the project level. This will allow you to give their role one set of permissions in Project A and another set of permissions in Project B. For example, Jane Doe may be the lead on all Campus projects, and John Doe the lead on all Medical Center projects. Project level permissions allow you to modify their permissions accordingly between projects A and B.

To add users to project level roles:


1. Go to the Users settings. For instructions, see [Access Users Settings](#).
2. Click **Manage Roles**.
3. Click the title of the role. All users currently in the account role display on the Users table.
4. Select the check box next to the user(s) you want to add to the role.
5. Click **Apply to Project Level**.

A message displays informing you that the selected users will be placed in

the project level role on all projects that they are a member of.

 **Tip:** See [Edit Project Role Associations](#) for instructions on placing users in different project roles across different projects.

6. Click **OK**.

 **Tip:** Click the number in the Project Level column to view the projects that the user is a member of.

#### 1.24.5.7 Copy Users


**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Manage User' Permission*

On occasion you will have a new user start that will have the exact project and role permissions as another user. Instead of having to create the new user and assign the associated projects and role, you can copy another user's project and role membership.

To copy users:

1. Go to the Manage Users page. For instructions, see [Access Manage Users Page](#).
2. Select the check box next to the user you want to copy, and then click **Copy User**. The Add New User page displays.
3. Enter the new user's profile information.

 **Tip:** When selecting a username, it is recommended to use the initial of the name followed by the last name or the user's email address. All usernames must be unique; otherwise you'll be prompted to enter another username.

4. Select the **Notify user that he/she has been added** check box to send a welcome email that includes their login information and instructions.
  5. Click **Save**.
-

### 1.24.5.8 Email Users

**This task can be completed by:**

- *Account Administrators*

You are able to send generic emails to account users and also have the option to inform them that they've been added to the account and send them their username and password.

To email users:

1. Go to the Manage Users page. For instructions, see [Access Manage Users Page](#).
2. Select the check box next to the users you want to email, and then click **Email User**. The Email Users page displays.
3. Complete all necessary fields.

**Tip:** CC yourself if you'd like to have a copy of the email for your personal records.

4. To inform users that they've been added to the account, select the **Notify user that he/she has been added** checkbox.
5. To include their username and password, select the **Include username and password** checkbox
6. Click **Send**.

### 1.24.5.9 Reassign Work - Users


**This task can be completed by:**

- *Account Administrators*

Account administrators have the ability to reassign work from one team member to another. There are several reasons why this may be necessary; such as if the user's roles have changed; workload needs to be reallocated; the resource is on vacation, out sick or no longer available. Anything that is assigned to a resource can be reassigned, such as tasks and workflow forms. Work reassignment can also be completed by project administrators from the Projects module. See Reassign Work - Projects for more information.

To reassign work from the Users section:

1. Go to the Manage Users page. For instructions, see [Access Manage Users Page](#).
2. Select the check box next to the users you want to reassign work for, and then click **Reassign Work**. The Reassign Work - Select Project page displays.
3. Select the project from which you'd like to reassign work. All open work items display on the next page.
4. Select the check box(es) next to the Items you want to reassign.
5. Click the **Select a user to reassign work to** drop-down arrow to make a selection.

 **Note:** By default, the Notify user check box is selected. If not cleared, an email will be sent to both the previous and new task owners, informing them of this change.


6. Click **Reassign**.

#### 1.24.5.10 Remove Users from Account

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Manage User' Permission*

Users may have to be removed from the account if they are no longer with the organization or their membership is no longer required on a particular account.

 **Note:** If you remove a user from an account while they are logged in, they will be logged out as soon as they attempt to take an action.

To remove users from the account:

1. Go to the Manage Users page. For instructions, see [Access Manage Users Page](#).
-

2. Select the check box next to the users you want to remove from the account. A confirmation page displays.
3. If the user(s) have work assigned to them, click the **This user still has work assigned** link to reassign their work to another resource.
4. Click **Remove User(s) from Account**.

Related Topics:

- [Reassign Work - Users](#)

#### 1.24.5.11 Import Users

**This task can be completed by:**


- *Account Administrators*
- *Participants with 'Manage Membership' Permission*

[Skip to instructions](#)

If you have a large number of users to add to e-Builder, you can import the list using an Excel spreadsheet. The following are the required fields and should be the column headers in your import file. Additional fields can also be added, as seen in the screenshot below.

- First Name
- Last Name
- Username
- Company
- Email
- License Type

If the column names in your import file are different from those in e-Builder, you must map the e-Builder columns to the corresponding columns in your file. However, if the column names are identical to the e-Builder field names, they will be automatically recognized and you will avoid having to map these fields. The image below is of the Field Mappings page that will appear after the file is uploaded. The left column lists the built-in e-Builder fields. The right column (with the drop-down menus) is the column names of the import file.

 **Note:** Custom field values can also be included in the import file.

## Import Users - Field Mappings

Step 2 of 3

## User Built-In Fields (Member Profile)




* First Name:	<input type="text" value="First Name"/>	* Last Name:	<input type="text" value="Last Name"/>
* User Name:	<input type="text" value="Username"/>	* Email:	<input type="text"/>
* Company:	<input type="text" value="Company"/>	* License Type:	<input type="text"/>
Expiration Date:	<input type="text"/>	Hide in Global Directory:	<input type="text"/>

## User Built-In Fields (Business Information)

* Type of Business:	<input type="text"/>	Title:	<input type="text"/>
Department:	<input type="text"/>	* Business Address:	<input type="text"/>
P.O. Box/Suite:	<input type="text"/>	* City:	<input type="text"/>
* State/Province:	<input type="text"/>	Country:	<input type="text"/>
* Postal/Zip Code:	<input type="text"/>	* Office Phone:	<input type="text"/>
Office Fax:	<input type="text"/>	Business Cell Phone:	<input type="text"/>
Business Pager:	<input type="text"/>		

\* Users will be required to complete these fields when logging in.

## User Built-In Fields (Personal Information)

Home Address:	<input type="text"/>	City:	<input type="text"/>
State/Province:	<input type="text"/>	Country:	<input type="text"/>
Postal/Zip Code:	<input type="text"/>	Home Phone:	<input type="text"/>
Home Fax:	<input type="text"/>	Personal Cell Phone:	<input type="text"/>
Personal Pager:	<input type="text"/>		

To import users:

1. Go to the Manage Users page. For instructions, see [Access Manage Users Page](#).
2. Click **Import**. The Import Users page displays.
3. Click **Browse** to search for and choose the import file.
4. Click **Next**.
5. If necessary, map the e-Builder built-in fields to the corresponding fields in the import file.
6. Click **Next**.
7. Click **Save**.

## 1.24.6 Manage Roles

### 1.24.6.1 Add New Account Roles

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Manage Membership' Permission*

Account roles are one of the first things to be completed when an account becomes active; however, as your organization changes, the need for new account roles may arise. You're able to add roles at any time.

To add new account roles:

1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
2. Click **Manage Roles**.
3. Click **Add Role**.
4. Enter a name for this account role.
5. Click **Save**.

From here you can [Add Users to Account Roles](#).

### 1.24.6.2 Add Users to Account Roles

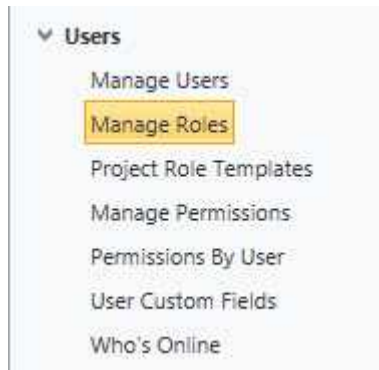
**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Manage Membership' Permission*

Users can be added to account roles at any time. As a best practice, role membership should be updated just as soon as a new person joins the organization/project or when user roles change.

To add users to account roles:

1. Go to the Users Settings. For instructions, see [Access Users Settings](#).
2. Click **Manage Roles**.



The Manage Roles page displays.

3. Click the title of the role.
4. Click **Add User to Role**.
5. Select the check box next to the users you want to add to this role.
6. Click **Add User**.

Related Topics:

- [Add New Account Roles](#)
- [About Project Level Roles](#)

#### 1.24.6.3 Remove Users from Account Roles

**This task can be completed by:**

- *Account Administrators*
- *Participants with 'Manage User' Permission*

Users might have to be removed from account roles if they are no longer part of the organization or if they are being added to a project level role. When applying project level roles, it is necessary to remove these users from the account role because the account level permissions will take precedence. Once this occurs, project level roles will take effect.

To remove users from account roles:

1. Go to the Users settings. For instructions, see [Access Users Settings](#).
  2. Click **Manage Roles**.
  3. Click the title of the role.
  4. Select the check box next to the user(s) you want to remove from the
-



account role.

5. Click **Remove From Role**. A confirmation message displays.
6. Click **OK**.

## 1.24.7 Users Page Overviews

### 1.24.7.1 Manage Users Page Overview

The Manage Users page allows e-Builder account administrators to add, remove and make modifications to users on the account. The following actions can be completed from this page:

- [Run User Adoption Report](#)
- [Add Existing Users](#)
- [Add New Users to Account](#)
- [Remove Users from Account](#)
- [Copy Users](#)
- [Email Users](#)
- [Reassign Work](#)
- [Import Users](#)

A description of these fields is located in the table below:

Fields	Descriptions
<b>Filter</b>	Click this button to render results after you have entered filter criteria in the Filter Users section.
<b>Clear</b>	Click this button to clear the fields in the filter.
<b>Filter Users</b>	This section allows you to enter specific criteria by which to narrow your search for users.
<b>Show Advanced Filter</b>	<p>Click this link to show advanced filter options. Use this section to filter for users by any of the following sets of information: email address, city, zip code, type of business, state/province, and custom fields.</p> <p>The custom field option will render results for any user that has the custom field you entered saved to their user profile. For information on adding user custom fields, see <a href="#">Manage Custom Fields</a>. Select the <i>User</i> object type in step 4.</p>

<b>User Adoption Report</b>	Click this button to run an adoption report on select users. Adoption reports display the amount of logins per user and the date of each user's last login date, in addition to user's names and company name.
<b>Add Existing User</b>	Click this button to add a user to your account that already has an e-Builder license.
<b>Add New User</b>	Click this button to add a new user to your account.
<b>Copy User</b>	Click this button to copy a user's project access and role permissions. On occasion you will have a new user start that will have the exact project and role permissions as another user. Instead of having to create the new user and assign the associated projects and role, you can copy an existing user's information and then save it under the new user's name, company, license type and email address.
<b>Email User</b>	Click this button to send an email to selected users.
<b>Remove From Account</b>	Click this button to remove select users from the account. You are prompted for confirmation before the action is finalized.
<b>Reassign Work</b>	<p>Click this button to reassign work from a selected user. You might need to reassign work from one user to another for several different reasons. The user could have gone on vacation, be out sick, needs to disperse the workload or has left the company.</p> <p>The reassign work function allows you to see all items assigned to a user across all projects (Workflow In Court, Workflow Initiated, Schedule Manager, Task Resource and Task Manager) and then you can choose the project and tasks to reassign.</p>
<b>Import</b>	<p>Click this button to import users into e-Builder using an Excel™ spreadsheet.</p> <p>For detailed steps, see <a href="#">Importing Users</a>.</p>
<b>Users (Table)</b>	<p><b>Edit</b> Click this link to edit the respective user's profile.</p> <p><b>Name</b> This column displays the user's first and last name. Click this link to open the User Details page.</p>

	<p><b>User Name</b> This column displays the user's login name.</p> <p><b>Company Name</b> This column displays the name of the company the user belongs to.</p> <p><b>Date Added</b> This column displays the date that the user was added to e-Builder.</p> <p><b>Last Login</b> This column displays the date the user lasts logged in to e-Builder.</p> <p><b>Access Expires</b> This column displays the date that the user's access to e-Builder will expires. Access expire dates apply to contract users, which are users that have access to e-Builder using on your organization's purchased licenses. You, as the account administrator have the ability to modify the access expiration date.</p> <p><b>License Expires</b> This column displays the date that a user's e-Builder license will expire. License expiration dates apply only to licensed users, who are vendors that have purchased their own e-Builder licenses to access your account. For more information, see <a href="#">Individual License Manager</a>.</p>
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#### 1.24.7.2 User Details Page Overview

The User Details page includes all the details of the user's profile, and allows you make modifications changes. For instructions, see [Edit User Details](#). Field level descriptions are located in the table below.

Fields	Descriptions
<b>Member Profile</b>	
<b>First Name</b>	Displays the user's first name.

<b>Last Name</b>	Displays the user's last name.
<b>Username</b>	Displays the user's username used to log in to e-Builder.
<b>Last Login</b>	Displays the date the user last logged in to e-Builder Enterprise™.
<b>License Type</b>	<p>Displays the user's license type. Options are as follows:</p> <p><b>Contracted License:</b> Contracted licenses are the licenses included in your e-Builder subscription. If your subscription includes 50 user licenses, you have 50 contracted licenses that may be assigned to users to give access to your account.</p> <p><b>Individual License:</b> An individual license is assigned to a user that is required to purchase their license prior to gaining access to your e-Builder account. They will be taken through a purchase process the first time they log in during which they will be able to purchase their license using a credit card.</p> <p>For more information, see <a href="#">Individual License Manager</a>.</p>
<b>Company</b>	Displays the user's company affiliation.
<b>Email Address</b>	Displays the user's email address.
<b>Access Expires</b>	If applicable, displays the date the account is set to expire.
<b>Hide in Global Directory</b>	A check mark in this field indicates that this user is hidden in the global directory, which ensures they cannot be added to multiple accounts. When <a href="#">adding existing users</a> from another account, this person will not be listed in the list of available users.
<b>Access to</b>	A check mark in this field indicates that this user only has


<b>documents only</b>	access to documents and not any other e-Builder module.
<b>Business Information</b>	
<b>Type of Business</b>	<p>Displays the type of business the user is affiliated with. Options may include any of the following:</p> <ul style="list-style-type: none"> <li>• Owner/Owner's Rep</li> <li>• Construction Manager</li> <li>• Architect/Engineer</li> <li>• General Contractor/ Design Builder</li> <li>• Specialty Contractor</li> <li>• Consultant</li> <li>• Supplier</li> <li>• Other</li> </ul>
<b>Department</b>	Displays the name of the department the user belongs to.
<b>P.O. Box/Suite</b>	Displays the user's P.O. Box or Suite address.
<b>Sate/Province</b>	Displays the user's state or province
<b>Postal/Zip Code</b>	Displays the zip code.
<b>Office Fax</b>	Displays the user's office fax number.
<b>Business Pager</b>	Displays the user's business pager.
<b>Title</b>	Displays the user's job title.
<b>Business Address</b>	Displays the user's business address.
<b>City</b>	Displays the city of the user's business address.
<b>Country</b>	Displays the user's business country of residence.

<b>Office Phone</b>	Displays the user's office phone number.
<b>Business Cell Phone</b>	Displays the user's business cell phone number.
<b>Custom Fields</b>	
<p>The Custom Fields tab list all user type global custom fields created for the account. Complete all pertinent fields for users that you are adding to the account. These same custom fields can be used as criteria for filtering. For information on adding user custom fields, see <a href="#">Manage Custom Fields</a>. Select the <i>User</i> object type in step 4.</p>	
<b>Personal Information</b>	
Click this tab to view the user's personal contact information.	
<b>Project Membership</b>	
Click this tab to view a list of the projects that the user is a member of. Click the project title to be redirected to the Project Details page.	
<b>Role Membership</b>	
Click this tab to view a list of roles that this user is a member of at the account and project level.	
<b>Contacts</b>	
Click this tab to view the contact records for this person.	

### 1.24.7.3 Add/Edit User Page Overview

The Add/Edit User page allows you to add new users to your e-Builder account or make modifications to existing user profiles. The table below describes all the fields and buttons located on this page.

Fields	Descriptions
<b>Member Profile</b>	
<b>First Name</b>	Enter the user's first name in this field.
<b>Last Name</b>	Enter the user's last name in this field.

<b>User Name</b>	Enter an e-Builder log in name for the user in this field. User name must be unique. Once a user name has been used for another user, it cannot be used again.
<b>License Type</b>	<p>Click this drop-down arrow to select a license type. Options are as follows:</p> <p><b>Contracted License:</b> Contracted licenses are the licenses included in your e-Builder subscription. If your subscription includes 50 user licenses, you have 50 contracted licenses that may be assigned to users to give access to your account.</p> <p><b>Individual License:</b> An individual license is assigned to a user that is required to purchase their license prior to gaining access to your e-Builder account. They will be taken through a purchase process the first time they log in during which they will be able to purchase their license using a credit card.</p> <p>For more information, see <a href="#">Individual License Manager</a>.</p>
<b>Access to Documents only</b>	Select this check box to give this user access to the Documents module only.
<b>Company</b>	Enter the company that the user represents in this field.
<b>Email Address</b>	Enter the user's email address in this field.
<b>Access Expires</b>	<p>Enter the date you want the user's access to end. Access expiration dates do not remove users from the account. Clear this field to grant them access again.</p> <p> <b>Note:</b> If a user is logged in and you enter an expiration date in the past for that user, they will be automatically logged out when attempting to take another action.</p>
<b>Hide in Global</b>	Select this check box to hide this user in the global directory,


<b>Directory</b>	which will prevent them from being added to multiple accounts. When <a href="#">adding existing users</a> from another account, this person will not be listed in the list of available users.
<b>Add New User as Contact</b>	Select to add the new user as a new contact or to an existing contact record.
<b>Business Information</b>	
You have the ability to pre-populate this information when you are adding a user. Doing so makes the registration process easier for users as they will be required to complete this information.	
<b>Type of Business</b>	Click this drop-down arrow to select the type of business the user represents. This is a list of default options that cannot be altered.
<b>Department</b>	Enter the name of the department the user belongs to in this field.
<b>P.O. Box/Suite</b>	Enter the user's P.O. Box or Suite address in this field.
<b>State/Province</b>	Click this drop-down arrow to select the user's state or province.
<b>Postal/Zip Code</b>	Enter the user's zip code in this field.
<b>Office Fax</b>	Enter the user's office fax number in this field.
<b>Business Pager</b>	Enter the user's business pager in this field.
<b>Title</b>	Enter the user's job title in this field.
<b>Business Address</b>	Enter the user's business address in this field.
<b>City</b>	Enter the city of the user's business address in this field.



<b>Country</b>	Click the drop-down arrow to select a country from the list.
<b>Office Phone</b>	Enter the user's office phone number in this field.
<b>Business Cell Phone</b>	Enter the user's business cell phone number in this field.
<b>Custom Fields</b>	
The Custom Fields tab list all user type global custom fields created for the account. Complete all pertinent fields for users that you are adding to the account. These same custom fields can be used as criteria for filtering. For information on adding user custom fields, see <a href="#">Manage Custom Fields</a> . Select the <i>User</i> object type in step 4.	
<b>Personal Information</b>	
Click this tab to add a user's personal contact information.	



#### 1.24.7.4 Manage Permissions Page Overview




The Manage Permissions page gives account administrators the ability to modify the level of access that each role has. The top portion of this page is a filter that you can use to narrow down the list of roles that display in the table below it. The second portion of this page lists all account roles. In e-Builder, account roles are used to group users. Although this page allows you to manage permissions by role, you can also modify permissions for individual users by going to the [Permissions By User](#) page. When managing user roles, it is important to ensure that each role is well defined and only includes those members that should have the access granted by that role's permissions. For instructions on adding account roles, see [Add New Account Roles](#).


 **Note:** Roles that appear in red are Administrator Roles. Administrator Roles are eligible to receive additional permissions typically reserved for the account administrator. For more information or for the list of additional permissions that can be granted, see [About e-Builder Administrative Roles](#).



A description of each permission setting is provided in the table below:



Field	Description
<b>Filter Roles and Users</b>	






<b>Roles</b>	Select this check box to filter for all roles.
<b>Admin Roles Only</b>	Select this check box to filter for admin roles only.
<b>All Roles</b>	Lists all roles available on the account. For instructions on adding account roles, see <a href="#">Add New Account Roles</a> .
<b>Selected Roles</b>	Lists all roles that have been selected to be included in the filter.
<b>Users</b>	Select this check box to filter for an individual user.
<b>Show All</b>	Click to disregard filter entries and see all account roles.
<b>Filter</b>	Click to filter for selected roles and/or users.
<b>Projects Tab</b>	
<b>Add New Project*</b>	<p>Gives users in this role the ability to add new projects. Account administrators might choose this as an alternative to giving certain roles/users full administrative rights.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Update Project Details</b>	Gives users in this role the ability to update project details, such as project name, the project administrator, address, project start and end dates, and project custom fields.
<b>Contacts Tab</b>	
<b>View Contacts*</b>	<p>Gives users in this role the ability to view all contacts and contact details stored in the system across all projects.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project</a></p>




	<a href="#">Level Roles.</a>
<b>Add/Edit Contacts*</b>	<p>Gives users in this role the ability to add contacts, modify contact details and import contacts.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles.</a></p>
<b>View Project Contacts</b>	<p>Gives users in this role the ability to view contact details for the projects they have access to.</p> <p>This gives people on the project ability to see project specific contacts while concealing the entire global contact list. For example, if there are 50 people in company, but only five are working on a particular project, you may not want contractors to know every other contractor or A/E that you're working with.</p>
<b>Processes Tab</b>	
<b>Manage Processes*</b>	<p>Gives users in this role the ability to update process types without being an account administrator.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles.</a></p>
<b>Manage Workflow</b>	Gives users in this role the ability to manage process instances, which includes the right to override steps, update and take action on steps of the processes they have access to.
<b>Import</b>	Gives users in this role the ability to import process instance details.
<b>Cost Tab</b>	
 <b>Note:</b> Cost integrated processes do not abide by these settings. Permissions	

for cost processes are set on the process properties page. For more information, see <a href="#">Properties Tab Overview</a> .	
<b>View Cost</b>	Gives users in this role the ability to view the overall cost summary and all cost related information on the projects they have access to.
<b>Add/Edit Budget</b>	Gives users in this role the ability to add and edit approved budgets, funding and cash flow.
<b>Add Budget Item</b>	Gives users in this role the ability to add budget line items to approved budgets and budget changes.
<b>Approve Final Budget</b>	Gives users in this role the ability to approve the final budget.  <b>Note:</b> Users will not receive an email notification on approval requests unless the 'Notify user when approval requested' setting is enabled in Cost Settings. For instructions, see <a href="#">Access Cost Setting Page</a> .
<b>Approve Budget Changes</b>	Gives users in this role the ability to approve budget changes.
<b>Add/Edit Commit</b>	Gives users in this role the ability to add and edit commitment changes.
<b>Approve Final Commit</b>	Gives users in this role the ability to approve commitments.
<b>Approve Commit Changes</b>	Gives users in this role the ability to approve commitment changes and change commitment line items.
<b>Change Approved Commit Line Item</b>	Gives users in this role the ability to approve changes made to approved commitment line items. <b>For example:</b> If a commitment was accidentally saved against the Contingency budget line item, when it should have been saved toward General Costs, persons with this permission setting will have the ability to approve this change or make such changes themselves.




<b>Add/Edit Actual</b>	Gives users in this role the ability to add and edit invoices.
<b>Approve Final Actual</b>	Gives users in this role the ability to approve invoices.
<b>Change Approved Gen. Invoice Line Item</b>	<p>Gives users in this role the ability to approve changes made to approved general invoice line items.</p> <p><b>For example:</b> If an invoice was accidentally added toward Contingency, when it should have been added to General Costs, persons with this permission setting will have the ability to approve this change or make such changes themselves.</p>
<b>Import</b>	Gives users in this role the ability to import cost data.
<b>Manage Templates*</b>	<p>Gives users in this role the ability to manage cost templates. This setting might be useful if the workload needs to be shared among various people or departments.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Modify Forecast</b>	Gives users in this role the ability to make changes to the forecast. This permission setting will likely be restricted to project managers.
<b>Calendar Tab</b>	
<b>Create Public Project Event</b>	Gives users in this role the ability to create public events. Everyone on a project is able to view public events, even if they are not an attendee of the event.
<b>Create Public General Event*</b>	<p>Gives users in this role the ability to create public general events. Events are private by default.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project</a></p>

	<a href="#">Level Roles.</a>
<b>Bidding Tab</b>	
<b>View Bidding</b>	Gives users in this role the ability to view an entire bid package.
<b>Create Bid Package</b>	Gives users in this role the ability to create bid packages.
<b>Modify Bidding</b>	Gives users in this role the ability to modify bid package details.
<b>View/Open Bid Tabulation</b>	Gives users in this role the ability to view and open the bid tabulation.
<b>Manage Template</b>	<p>Gives users in this role the ability to manage bidding templates.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles.</a></p>
<b>Schedule Tab</b>	
<b>Manage Templates*</b>	<p>Gives users in this role the ability to create and store schedule templates on the account.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles.</a></p>
<b>Manage Baselines</b>	Gives users in this role the ability to overwrite the baseline after it has been created and saved. This permission will most likely be restricted so that Project Managers are not re-saving the baseline.
<b>Reports Tab</b>	

<b>Subscribe*</b>	<p>Gives users in this role the ability to subscribe other users to a report.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Copy*</b>	<p>Gives users in this role the ability to copy a report. If you create a personal report, someone with this permission can copy this report for themselves or others. However Account Administrator's reports cannot be copied because they have the ability to make it available to others if they choose.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Users Tab</b>	
<b>Manage User*</b>	<p>Gives users in this role the ability to add and remove other users from the account.</p> <p> <b>Tip:</b> Please be aware that adding additional users does add licenses to your account, so it is advisable to keep this permission to a minimum.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Manage Membership</b>	<p>Gives users in this role the ability to manage the projects that users are on and user roles.</p>
<b>Manage Templates*</b>	<p>Gives users in this role the ability to create user templates, such as project level role templates.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this</p>

	<p>role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Forms Tab</b>	
<b>Manage Form Instances*</b>	<p>Gives users in this role the ability to close form instances or change the permissions on the instance.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Manage Form Types*</b>	<p>Gives users in this role the ability to add, remove or modify fields on form types.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Import*</b>	<p>Gives users in this role the ability to import form instance details.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Submittals</b>	
<b>View Submittals</b>	Gives users in this role the ability to view submittal items.
<b>Add/Edit Submittals</b>	Gives users in this role the ability to add and edit submittal items. This permission should be given to contractors, as they will need to add, edit and send submittal items for review.




<b>Planning Tab</b>	
<b>View Capital Plan*</b>	<p>Gives users in this role the ability to view capital plans. In some cases, there may be someone responsible for managing capital plan and another responsible for scenarios.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Modify Capital Plan*</b>	<p>Gives users in this role the ability to edit capital plans.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>View Planning Scenarios</b>	<p>Gives users in this role the ability to view planning scenarios. In some cases, there may be someone responsible for managing capital plan and another responsible for scenarios.</p>
<b>Modify Planning Scenarios</b>	<p>Gives users in this role the ability to edit planning scenarios.</p>
<b>Manage Templates*</b>	<p>Gives users in this role the ability to manage planning templates.</p> <p> <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a>.</p>
<b>Documents Tab</b>	
<b>View All Sent Items</b>	<p>Gives users in this role the ability to see all of their sent items as well as the items send by everyone else.</p>


<b>Manage Quarantine</b>	Gives users in this role the ability to manage the spam quarantine. See <a href="#">About Spam Filter</a> for more information on this feature.
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#### 1.24.7.5 Permissions by User Page Overview


The Permissions by User page gives account administrators the ability to modify the individual user's level of access to different portions of e-Builder. The top portion of this page is a filter that you can use to narrow down the list of users that display in the table below it. The second portion of this page lists all users saved on the account. A description of each permission setting is provided in the table below:

Field	Description
<b>Filter Users</b>	
<b>User Name</b>	Enter the user name to filter by.
<b>Select a custom field...</b>	Click the drop-down arrow to choose a custom field to filter by.
<b>First Name</b>	Enter the first name of the user to filter by.
<b>Last Name</b>	Enter the last name of the user to filter by.
<b>Show All</b>	Click to disregard filter entries and see all account roles.
<b>Filter</b>	Click to filter for the selected user.
<b>Projects Tab</b>	
<b>Add New Project</b>	Gives user the ability to add new projects. Account administrators might choose this as an alternative to giving certain roles/users full administrative rights.
<b>Update Project Details</b>	Gives user the ability to update project details, such as project name, the project administrator, address, project start and end dates, and project custom fields.
<b>Contacts Tab</b>	

<b>View Contacts</b>	Gives user the ability to view all contacts and contact details stored in the system across all projects.
<b>Add/Edit Contacts</b>	Gives user the ability to add contacts, modify contact details and import contacts.
<b>View Project Contacts</b>	<p>Gives user the ability to view contact details for the projects they have access to.</p> <p>This gives the user the ability to see project specific contacts while concealing the entire global contact list. For example, if there are 50 people in company, but only five are working on a particular project, you may not want contractors to know every other contractor or A/E that you're working with.</p>
<b>Processes Tab</b>	
<b>Manage Processes</b>	Gives user the ability to update process types without being an e-Builder Administrator.
<b>Manage Workflow</b>	Gives user the ability to manage process instances, which includes the right to override steps, update and take action on steps of the processes they have access to.
<b>Import</b>	Gives user the ability to import process instance details.
<b>Cost Tab</b>	
 <b>Note:</b> Cost integrated processes do not abide by these settings. Permissions for cost processes are set on the process properties page. For more information, see <a href="#">Properties Tab Overview</a> .	
<b>View Cost</b>	Gives user the ability to view the overall cost summary and all cost related information on the projects they have access to.
<b>Add/Edit Budget</b>	Gives user the ability to add and edit approved budgets, funding and cash flow.
<b>Add Budget Item</b>	Gives user the ability to add budget line items to approved budgets and budget changes.

<b>Approve Final Budget</b>	<p>Gives user the ability to approve the final budget.</p> <p> <b>Note:</b> Users will not receive an email notification on approval requests unless the 'Notify user when approval requested' setting is enabled in Cost Settings. For instructions, see <a href="#">Access Cost Setting Page</a>.</p>
<b>Approve Budget Changes</b>	Gives user the ability to approve budget changes.
<b>Add/Edit Commit</b>	Gives user the ability to add and edit commitment changes.
<b>Approve Final Commit</b>	Gives user the ability to approve commitments.
<b>Approve Commit Changes</b>	Gives user the ability to approve commitment changes and change commitment line items.
<b>Change Approved Commit Line Item</b>	<p>Gives user the ability to approve changes made to approved commitment line items.</p> <p><b>For example:</b> If a commitment was accidentally saved against the Contingency budget line item, when it should have been saved toward General Costs, persons with this permission setting will have the ability to approve this change or make such changes themselves.</p>
<b>Add/Edit Actual</b>	Gives user the ability to add and edit invoices.
<b>Approve Final Actual</b>	Gives user the ability to approve invoices.
<b>Change Approved Gen. Invoice Line Item</b>	<p>Gives user the ability to approve changes made to approved general invoice line items.</p> <p><b>For example:</b> If an invoice was accidentally added toward Contingency, when it should have been added to General Costs, persons with this permission setting will have the ability to approve this change or make such changes themselves.</p>

<b>Import</b>	Gives user the ability to import cost data.
<b>Manage Templates</b>	Gives user the ability to manage cost templates. This setting might be useful if the workload needs to be spread among various people or departments.
<b>Modify Forecast</b>	Gives user the ability to make changes to the forecast. This permission setting will likely be restricted to project managers.
<b>Calendar Tab</b>	
<b>Create Public Project Event</b>	Gives user the ability to create public events. Everyone on a project is able to view public events, even if they are not an attendee of the event.
<b>Create Public General Event*</b>	Gives user the ability to create public general events. Events are private by default.
<b>Bidding Tab</b>	
<b>View Bidding</b>	Gives user the ability to view an entire bid package.
<b>Create Bid Package</b>	Gives user the ability to create bid packages.
<b>Modify Bidding</b>	Gives user the ability to modify bid package details.
<b>View/Open Bid Tabulation</b>	Gives user the ability to view and open the bid tabulation.
<b>Manage Templates*</b>	Gives users the ability to manage bidding templates.  <b>Note:</b> The asterisk indicates that users have to be in this role at the account level in order to inherit this permission. In other words, this permission cannot be applied to a project level role. For more information, see <a href="#">About Project Level Roles</a> .
<b>Schedule Tab</b>	
<b>Manage</b>	Gives user the ability to create and store schedule templates

<b>Templates</b>	on the account.
<b>Manage Baselines</b>	Gives user the ability to overwrite the baseline after it has been created and saved. This permission will most likely be restricted so that Project Managers are not re-saving the baseline.
<b>Reports Tab</b>	
<b>Subscribe</b>	Gives user the ability to subscribe other users to a report.
<b>Copy</b>	Gives user the ability to copy a report. If you create a personal report, someone with this permission can copy this report for themselves or others. However Account Administrator's reports cannot be copied because they have the ability to make it available to others if they choose.
<b>Users Tab</b>	
<b>Manage User</b>	Gives user the ability to add and remove other users from the account.   <b>Tip:</b> Please be aware that adding additional users does add licenses to your account, so it is advisable to keep this permission to a minimum.
<b>Manage Membership</b>	Gives user the ability to manage the projects that users are on and user roles.
<b>Manage Templates</b>	Gives user the ability to create user templates, such as project level role templates.
<b>Forms Tab</b>	
<b>Manage Form Instances</b>	Gives user the ability to close form instances or change the permissions on the instance.
<b>Manage Form Types</b>	Gives user the ability to add, remove or modify fields on form types.
<b>Import</b>	Gives user the ability to import form instance details.

<b>Submittals</b>	
<b>View Submittals</b>	Gives user the ability to view submittal items.
<b>Add/Edit Submittals</b>	Gives user the ability to add and edit submittal items. This permission should be given to contractors, as they will need to add, edit and send submittal items for review.
<b>Planning Tab</b>	
<b>View Capital Plan</b>	Gives user the ability to view capital plans. In some cases, there may be someone responsible for managing capital plan and another responsible for scenarios.
<b>Modify Capital Plan</b>	Gives user the ability to edit capital plans.
<b>View Planning Scenarios</b>	Gives user the ability to view planning scenarios. In some cases, there may be someone responsible for managing capital plan and another responsible for scenarios.
<b>Modify Planning Scenarios</b>	Gives user the ability to edit planning scenarios.
<b>Manage Templates</b>	Gives user the ability to manage planning templates.
<b>Documents Tab</b>	
<b>View All Sent Items</b>	Gives user the ability to see all of their sent items as well as the items send by everyone else.
<b>Manage Quarantine</b>	Gives user the ability to manage the spam quarantine. See <a href="#">About Spam Filter</a> for more information on this feature.


#### 1.24.7.6 User Adoption Report Page Overview

The User Adoption Report allows account administrators to run a real-time report on how often users are logging into e-Builder. This page lists all account users, their company affiliation, number of logins and the last time they accessed the system. Field-level descriptions are located below.

Field	Description
<b>Includes user activity between</b>	By default, a date range for the previous month populates these fields. Enter new dates to run the report for a different time period.
<b>Run Report</b>	Click to run this report.
<b>Print</b>	Click to view a printable version of the report. A secondary window opens with a Print button available.
<b>Export</b>	Click to export report data to an Excel spreadsheet.
<b>Cancel</b>	Click to leave this page and return to the <a href="#">Manage Users</a> page.
<b>First Name</b>	Displays the account participant's first name.
<b>Last Name</b>	Displays the account participant's last name.
<b>Company Name</b>	Displays the company name the user is associated with.
<b>Username</b>	Displays the account participant's username.
<b>Logins</b>	Displays the total number of times the person has logged in to e-Builder.
<b>Last Login</b>	Displays the date the user last logged in to e-Builder.

#### 1.24.7.7 Manage Roles Page Overview

This page allows account administrators and those with Manage User permissions to add, remove and modify account roles. Account roles are necessary in order to grant permissions in a unified manner.

 **Note:** Account roles must exist, even if you are enacting project level roles. For more information, see About Project Level Roles.

The following actions can be completed from this page:

- [Add Account Roles](#)



- [Remove Users from Account Roles](#)
- [Add Users to Account Roles](#)


Below are field-level descriptions of this page.

Fields	Descriptions
<b>Add Role</b>	Click to add an account role.
<b>Remove Role(s)</b>	Click to remove account roles.
<b>Edit</b>	Click to modify the details of the account role.
<b>Name</b>	Displays the name of the account role. Click to open the <a href="#">View Account Role</a> page where you're able to add or remove users from the role, view role membership or apply project level permissions.
<b>Description</b>	Displays a description of the field, as entered by an account administrator.
<b>Number of Users</b>	Displays the number of users that are members of the role.
<b>Admin Role?</b>	<p>A check mark in this column indicates that this is an <a href="#">Administrator Role</a>; a distinction that allows administrators to give the members of this role additional permission typically reserved for the account administrator. Below is a list of the permissions that can be given to the Administrator Role:</p> <ul style="list-style-type: none"> <li>• <b>Manage Users:</b> Allow users to add/edit users for the projects they are a member of.</li> <li>• <b>Manage Memberships:</b> Allow users to add/edit projects and users for the projects they are a member of.</li> <li>• <b>Manage Processes:</b> Allow users to add/edit processes and workflows of the projects they are a member of.</li> <li>• <b>Manage Workflows:</b> Allow users to modify process instances on the projects they are a member of, such as overriding a workflow and delegating process</li> </ul>

	<p>instances.</p> <ul style="list-style-type: none"> <li>• <b>Manage Cost Templates:</b> Allow users to add/edit the budget, cash flow, and forecast templates of the projects they are a member of.</li> <li>• <b>Manage Schedule Templates:</b> Allow users to add/edit schedule templates of the projects they are a member of.</li> <li>• <b>Manage Forms:</b> Allow users to add/edit forms for the projects they are a member of.</li> <li>• <b>Manage Planning Templates:</b> Allow users to add/edit planning templates of the projects they are a member of.</li> </ul> <p>See <a href="#">About e-Builder Administrative Roles</a> for more information.</p>
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#### 1.24.7.8 View Account Role Page Overview

Each time a new person joins a project, or when participant's roles change throughout the organization, account role records should be adjusted accordingly. From this page, account administrators are able to view the details of account roles and make changes to them. Project-level permissions can be given and users can be added or removed.


 **Note:** As a reminder, to designate a role as a project-level role, do not add users to the role at the account level. See [Account Role Management](#) for more information.

The following actions can be taken from this page:

- [Add Users to Project Roles](#)
- [Add Users to Account Roles](#)
- [Remove Users from Account Roles](#)


Field-level descriptions are located below:

Fields	Descriptions
Edit	Click to modify the details of the account role.

<b>Cancel</b>	Click to return to the <a href="#">Manage Roles</a> page.
<b>Apply to Project Level</b>	Click to apply project-level permissions to the selected account role. Doing so gives members the associated permissions on all projects they are a member of. Project-level roles allow you to diversify the permission of a role from project to project. See <a href="#">Account Role Management</a> for more information.
<b>Add User to Role</b>	Click to add users to the select role(s).
<b>Remove from Role</b>	Click to remove the selected user(s) from the account role.  <b>Note:</b> If this role has a project level assignment, this action will only remove them from the role at the account level. This is necessary to ensure the user only has access at the project level. See <a href="#">About Project Level Roles</a> for more information.
<b>Name</b>	Displays the name of the account role. Click to open the <a href="#">View Account Role</a> page where you're able to add or remove users from the role, view role membership or apply project level permissions.
<b>User Name</b>	Displays the member's user name.
<b>Company Name</b>	Displays the name of the company the users is associated with.
<b>Project Level</b>	Displays the number of projects for which this role is available at the project level.
<b>Date Added</b>	Displays the date the user was added to this role.

### 1.24.7.9 Add/Edit Account Role Page Overview

This page allows account administrators and those with 'Manage User' permission to add roles to the account. Access to various functions in e-Builder is permission based. While permissions can be given to individual users, as a best practice, they should be managed by roles.

 **Note:** To maintain project-level permissions, do not add those users to the role at the account level. For more information, see [Account Role Management](#).

A description of these fields is located in the table below:

Fields	Descriptions
<b>Save</b>	Click to save changes.
<b>Cancel</b>	Click to go back to the <a href="#">View Account Role</a> page. All unsaved changes will be lost.
<b>Name</b>	Enter a name for the account role in this field.
<b>Description</b>	Enter a description of this role. This description will be visible on the <a href="#">Manage Roles</a> page.
<b>Is Administration Role</b>	Choose whether or not to make this an Administrative Role. Account administrators are able to give these roles additional permissions that are typically reserved for account administrators.
<b>Custom Field Permissions</b>	If available, Role custom fields display here. You can set these custom fields to be edit or read-only.

### 1.24.7.10 Add Users to Role Page Overview

Account administrators and users with Manage User permission are able to add users to the select role from this page. You can also view the details of a user's account by clicking the user's name. Field-level descriptions are located in the table below.

Fields	Descriptions
<b>Show/Hide Advanced Filter</b>	Click to show or hide the advance filter options. Standard filtering includes the person's name, username and company affiliation. Advanced options include their email address, physical address, type of business and custom fields, if available.
<b>Filter</b>	Click to filter for the entered criteria.
<b>Add User</b>	Click to add users to the select role(s).
<b>Cancel</b>	Click to go back to the <a href="#">View Account Role</a> page.
<b>Name</b>	Displays the name of the account role. Click to open the <a href="#">View Account Role</a> page where you're able to add or remove users from the role, view the permissions of this role or apply permissions to the project level.
<b>User Name</b>	Displays the member's user name.
<b>Company Name</b>	Displays the name of the company the users is associated with.
<b>Date Added</b>	Displays the date the user was added to this role.

#### 1.24.7.11 Who's Online Page Overview

This page lists all account users who have been active in the last 20 minutes. Every minute, the system checks to see if any actions have been taken for a logged in user and after 20 minutes of inactivity, they are removed from this page. This is a great tool for account administrators to monitor and verify account activity. Clicking a user's name will open the User Details page for you to access additional information about each person. A description of each field is located in the table below.

Fields	Descriptions
<b>Name</b>	Displays the user's name. Click to open the <a href="#">User Details</a> page to view member profile and business information, and manage membership details.
<b>User Name</b>	Displays the member's user name.
<b>Company Name</b>	Displays the name of the company the users is associated with.

## 1.25 Views

### 1.25.1 About Setting Up Views

Views allow you to filter the information that is displayed on screen when a module is selected from any of the Top Navigation tabs.



Views can be created by an administrator for all members on the account or for specific roles. They can also be created by team members themselves. Personal views are only accessible by the person that created it. Anyone with access to a project is able to create a view, regardless of their permission settings. Custom views are beneficial because they allow you to see only the information you deem pertinent. Views also help team mates focus only on the items that require their attention when a module is first accessed. As many views as necessary can be created.

**💡 For example:** You might create a view for project managers that are responsible for approving design documents for a set of construction projects located in the west region of your company's territory. You could create a view in the Documents module that shows all necessary data for all projects located in the west region. This would ensure that when project managers access the Documents module they would see the necessary data for all applicable projects.

The remaining information, while not displayed, can be still be accessed at any time by going into the module. The following topics will help you manage views:

- [Access View Settings](#)
- [Create Views for Team Members.](#)


- [Add/Edit Views Page Overview](#)

### 1.25.2 Access View Settings

View settings allow account administrators to create views for themselves and the members of their account. To learn more, see [About Setting Up Views](#).

To access View settings:

1. Click **Setup** from the Top Navigation tabs.

 **Note:** If the Setup tab is not visible, click the Plus sign, and then click the Setup link.



2. In the **Administration Tools** section, click **Views**.
3. Select the module you like to create views for.


### 1.25.3 Create Views for Team Members

Account administrators are able to assign views to all team members or select account roles. The views that you create for your team members will be available from the Views drop-down menu. Views can be updated at any time. To learn more, see [About Setting Up Views](#).

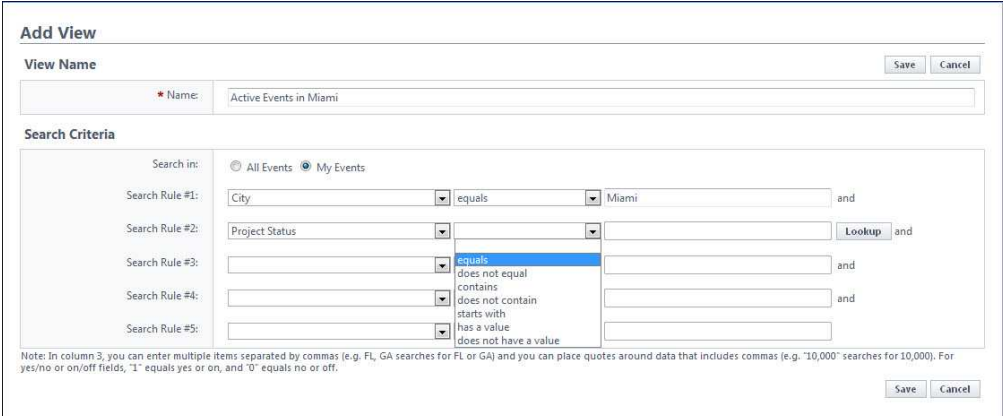


To create views for members of your team:

1. Go to View settings. For instructions, see [Access View Settings](#).
2. Select the module you wish to set up views for. The Manage Views page displays.
3. Click **Add View**. The Add Views page displays.
4. Enter the name of the view the **Name** field.
5. Use the **Search Criteria** section, to specify the criteria for this view.

 **Note:** Options in the Search Criteria section will differ for each module.

- a. Click the **Search Rule #1** drop-down arrow and select an event or project detail by which to choose the first criteria of this custom view.
- b. Click the second column drop-down arrow to select a qualifier.



**Add View**

View Name Save Cancel

\* Name: Active Events in Miami

**Search Criteria**

Search in:  All Events  My Events

Search Rule #1: City equals Miami and

Search Rule #2: Project Status equals [empty] Lookup and

Search Rule #3: [empty] equals [empty] and

Search Rule #4: [empty] does not contain [empty] and

Search Rule #5: [empty] has a value [empty]

Note: In column 3, you can enter multiple items separated by commas (e.g. FL, GA searches for FL or GA) and you can place quotes around data that includes commas (e.g. '10,000' searches for 10,000). For yes/no or on/off fields, '1' equals yes or on, and '0' equals no or off.

Save Cancel

- c. In the third column, enter the qualifying value. If available, you can also click the **Lookup** button to select from a list of options.
6. Repeat step 5 for each required search rule.
  7. If the section: 'Columns Displayed (numbered left to right)' displays, click the drop-down arrows for specific the order of your columns from left to right.
  8. If the section: 'Select the primary column' displays, select **Ascending** or **Descending**.
  9. In the **Access Criteria** section, select the appropriate option for assigning this view to either All Users or Selected Roles.
  10. If Selected Roles was selected, select the roles, and then click the right



directional arrow to add them to the adjacent 'Roles with Access' panel.


11. Click **Save**.

#### 1.25.4 Manage Views Page Overview

The Manage View page allows you to modify or delete the personal views you've created for yourself. Every licensed e-Builder user is able to create personal views for the modules that they have access to. Views allow you to customize the data that is currently in view when you access a module from the Top Navigation tabs. Multiple views can be created for one or more of your projects combined. The following topics will assist you when working with Views:

- About Views
- Add Views
- Add/Edit Views Page Overview

Field-level descriptions for this page are located below:

Field	Description
Save Changes	Click to save changes.
Action	<p><b>Edit:</b> Click to modify the details of the view.</p> <p> <b>Note:</b> Account Views cannot be deleted. Such views are created by an administrator and made available to all account users. However, you can hide account views so that they do not in your list of views.</p> <p><b>Copy:</b> Click to copy the template. Creating a new template from a previous one is a quick and easy way to save a new template without having to start from scratch.</p> <p><b>Delete:</b> Click to delete the template. Please be aware that only personal templates can be deleted. Account templates can only be hidden.</p>
View Name	Displays the name of the view.

<b>Type</b>	Indicates whether or not the view of a personal one or an account view. Personal views are the ones that you've created and account views are created by an account administrator who has made the view accessible account-wide.
<b>Status</b>	Indicates whether the view currently active or hidden. Active views are accessible from their respective modules and views that are hidden cannot be seen from the User Interface.

### 1.25.5 Add/Edit Views Page Overview (Admin)


This page allows account administrators to create views for themselves or account members. Views allow you to filter the information that is displayed on screen when a module is selected from any of the Top Navigation tabs. Custom views are beneficial in that they allow you to see only the information you deem most important and as many views can be created as necessary. Views are highly customizable. As a result, there are various filters on this page that enable you display only the items that match your search criteria. To learn more, see [About Setting up Views](#). For instructions, see one of the following topics:

- [Create Views for Team Members](#)
- Add Views

Below are descriptions of the fields and buttons located on this page:

Field	Description
<b>Save</b>	Click to save changes.
<b>Cancel</b>	Click to discard changes.
<b>View Name</b>	
<b>Name</b>	Enter a name for the view in this field. Depending on the module you're creating the view for, examples might include: 'Bids in Development', 'Open Bids in A/E & Constructions', 'Open RFI's', 'Open Change Orders' etc.
<b>Search Criteria</b>	

**Search in**

 **Note:** This option is available in all modules except for Companies/Contacts and Cost.

This filter allows you to narrow the results that appear in your view by any of the listed categories. Options will vary between modules as follows:

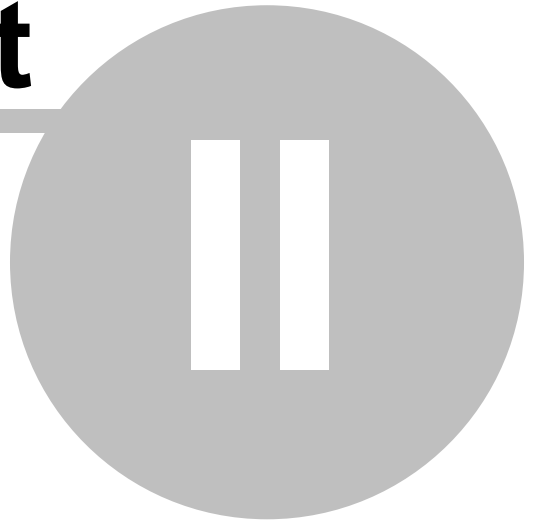
- **All Projects** - Select to include items from all projects.
- **My Projects** - Select to include only items from the projects that you are a member of.
- **Projects I Administer** - Select to include items only items from the projects that you are an administrator of.
- **All Events** - This option is specific to the Calendar module. Select to include All events, from projects across the account. For instructions, see Create All Events Calendar View.
- **My Events** - This option is specific to the Calendar module. Select to include only the events that you are a participant of. For instructions, see Create All Events Calendar View.
- **Forms Initiated By Me** - Select to include only the forms that you've initiated.
- **Forms In My Court** - Select to include only the forms that currently require your attention.
- **All Forms** - Select to include forms from every project on the account, including those that you've initiated, those that require your attention as well as forms initiated by others and are in the court of other account participants.
- **Processes Initiated By Me** - Select to include only the processes that you've initiated.
- **Processes In My Court** - Select to include only the processes that are currently in your court.
- **All Processes** - Select to include processes from every project on the account, including those that you've initiated, those that require your attention as well as processes initiated by others and are in the court of other

	<p>account participants.</p> <ul style="list-style-type: none"> <li>• <b>My Schedules</b> - Select to include only the schedules that you manage.</li> <li>• <b>All Schedules</b> - Select to include all project schedules available on the account.</li> <li>• <b>My Tasks</b> - Select to include only the tasks that are assigned to you.</li> <li>• <b>Tasks I Manage</b> - Select to include only the tasks that you manage.</li> <li>• <b>All Tasks</b> - Select to attach all account tasks, including those that are and are not assigned to you.</li> </ul>
<b>Process Type</b>	This field is only available for Process views. To restrict this view to a single process type, make a selection in this field.
<b>Search Rules</b>	The Search Rule options allow you to further define the data elements to include in your view. Option will vary between modules, but a few common examples include: active status, project status, city, zip and custom fields.
<b>Columns Displayed (numbered left to right)</b>	
<b>Columns</b>	This section allows you to choose the order in which columns will display in your view.
<b>Sort View</b>	
<b>Sort Column</b>	Select a column to be the first that displays and used to sort data in the views.
<b>Access Criteria</b>	
This section is only available to account administrators. Access criteria allows you to assign the view to particular users or certain roles.	
<b>Make available to</b>	<p><b>All Users</b> - Select to choose from a list of account users to assign the view to.</p> <p><b>Selected Roles</b> - Select to choose from a list of account roles to</p>

	assign the view to.
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**Part**

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## 2 Printable User/Administrator Guides (PDFs)

The following PDF User Guides are available below:

- [User and Administrative Guide](#)
- [Individual User Guides](#)
- [Administrative Guide](#)

### User and Administrative Guide

- [User and Administrative Guide](#)

### Individual User Guides

- [Bidding Module](#)
  - [Calendar Module](#)
  - [Contacts Module](#)
  - [Cost Module](#)
  - [Dashboards Module](#)
  - [Documents Module](#)
  - [eSignature Setup Guide](#)
  - [Equipment Management](#)
  - [Forms Module](#)
  - [Home Module](#)
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  - [Plan Room Setup Guide](#)
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  - [Processes Module](#)
  - [Projects Module](#)
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- [Views](#)

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