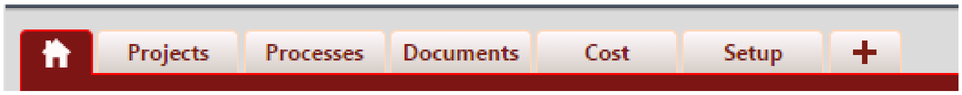
# e-Builder **at IU**

Indiana University has chosen to use the e-Builder Capital Projects Management System.

The site login address is [https://app.e-builder.net/](https://app.e-builder.net/).

E-Builder modules are listed across the top.




## HOME

The Home tab is a centralized place where all e-Builder users can see upcoming items which are relevant to them.

| WORKFLOWS IN YOUR COURT<br>This table includes process instances that require you to take an action or comment on. | |
|---|---|
| Show | By default this filter is set to display the first ten process instances in your court, but you can click this drop-down arrow to select between the first ten, twenty or fifty. |
| Project | Displays the name of the project the workflow is associated with. |
| Name | Displays the name of the process. |
| Subject | Displays the subject of the process instance. |
| Step | Displays the name of the process step that requires your action or comment |
| Date Due | Displays the date that action is required to be taken on the step. |
| Requested Comment | If you've been requested to comment on a process step, a check mark appears in this column. |

| MY TASKS<br>This table includes all tasks that require your attention, such as a task that has been assigned to you. If you are a manager who receives notification when tasks reach a certain level of completion, these tasks will display in your court as well. | |
|---|---|
| *Show* | *By default this filter is set to display the first ten tasks in your court, but you can click this drop-down arrow to choose from the selection.* |
| Project | Displays the name of the project the task is associated with. |
| Task | Displays the name of the task. |
| Finish Date | If applicable, displays the date that the task was completed. |
| % | Displays the task's completion percentage. |
| Manager | Displays the name of the task's manager. |

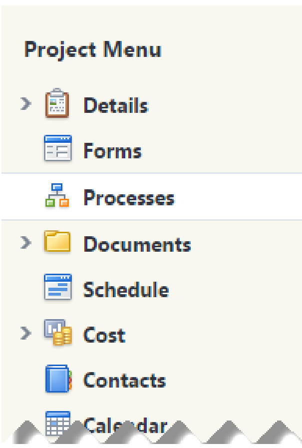
## PROJECTS

The main Projects page can be customized with views, which will allow you to display only the information you need, based on selected views. Select a project to view the project details and view the project menu on the left of the screen.

To add a view:

1. Click the Add View link.
2. Enter the name of the view.
3. Specify the search criteria for the view.
4. Select the columns to return.
5. Click Save

The various modules listed across the top are also listed at the project level.




## FORMS

The most common form which will be used is the Action Item. This form is used to request an action from another project team member not covered in a defined process.

## PROCESSES

Click Start Process button located towards the top right. A list of processes the user has permissions to start is given. Many process have a step for the user to review the information presented in the layout.

| Buttons displayed<br>This table includes most of the process instances buttons displayed during review. | |
|---|---|
| Take Action | Click on the drop-down arrow to the left of this field to select an action to take, and then click this button to take the action. Taking action will move the process to the next step in the workflow. |
| Submit | Click this button to complete the start step when initiating a process. |
| Accept | When visible, if clicked this process instance is recorded as being accepted by the user. However, this process instance remains in the user's action. It is recommended to not use this. |
| Delegate | When visible, if clicked this process instance is in the person delegated to action. However, nothing has changed regarding the project. It is recommended to not use this. |
| Check Spelling | Click this button to click the spelling of data fields on this page. |
| Save | Click this button to Save the current filled out data and return to it at a later time. |
| Cancel | Click this button to cancel the current action. All unsaved data will be lost. |
| Copy | When visible. It is recommended to not use this. |
| Links<br>This table includes most of the process instances links displayed during review. | |
| Show History | Click this link to open the Routing History page and view an audit trail of the process. |
| Current Actors | Click this link to view current actors on the process steps. |
| Show Workflow Diagram | Click this link to view the workflow diagram. The current step will be highlighted. |
| Delegate | When visible, if clicked this process instance is in the person delegated to action. However, nothing has changed regarding the project. It is recommended to not use this. |
| Tabs<br>This table includes a couple of the process instances tabs displayed during review. | |
| Comments | Click this tab to view a list of comments added to the process in chronological order. Date and time stamps are included. |
| Attached Documents Tab | Click this tab to download and view a list of documents attached to the process. From here you can also attach documents as a reference or supporting evidence. |

## DOCUMENTS

The documents part of the system is the repository of all project related documents, including design documents, copies of invoices or details supporting CCD's, meeting minutes, etc. Some of the information is most easily accessed directly through this module, but much of it is more easily accessed through the processes that created the information.

### ROLES

| | |
|---|---|
| 01 – BOT | Used in workflow to approve all construction contracts |
| 01 – AVP CPF | Used in workflow to approve CCD's over $25K and notifications of other activity |
| 01 – VP CPF | Used in workflow to approve Notice to Proceed |
| 01 - VPCPF Exec Admin | Has access to update certain project attributes and certain folders |
| 01 – VPCPF Funding | Used in workflow to get funding verification from various departments. Also can add documents to the funding folder. |
| 01 – UAO Coordinator | Handles the initial processing for all non-furniture only requests (RFS) – used in workflow |
| 01 – VPCPF Other | Internal IU staff who have access to information to all projects in system |

### DOCUMENT MODULE

| | | | | | | |
|---|---|---|---|---|---|---|
| V – View | D - Download | R – Redline | M – Modify | C – Create (upload file) | F – Create Folder | N – no access |

| | 01 – BOT | 01 – AVP CPF | 01 – VP CPF | 01 – VPCPF Exec Admin | 01 – VPCPF Funding | 01 – UAO Coordinator | 01 – VPCPF Other |
|---|---|---|---|---|---|---|---|
| Documents | V | V | V | V | V | V | V |
| 01 Email In-Box | - | VDC | VDC | VC | VDC | VD | VC |
| 02 Project Setup | VD | VD | VD | VD | VD | VD | VD |
| 03 Funding | - | VD | VD | VD | VDRMCF | VD | VD |
| 04 Contracts and Invoices | - | VD | VD | VDCF*d* | VD | VD | VD |
| 05 Legal, Environmental, Real Estate | - | VD | VD | VDCF | VD | VD | - |
| 06 Planning | - | VD | VD | VD | VD | VD | VD |
| 07 Design | - | VD | VD | VD | VD | VD | VD |
| 08 Bidding | VD | VD | VD | VD | VD | VD | VD |
| 09 Construction | - | VD | VD | VD | VD | VD | VD |
| 10 Warranty | - | VD | VD | VD | VD | VD | VD |
| 11 Close-out | - | VD | VD | VD | VD | VD | VD |
| 12 Photos and Images | VD | VDCF | VD | VDRCF | VD | VD | VD |
| 13 Meeting Minutes | | VD | VD | VDCF | VD | VD | VD |

## Reports

The report module allows the user to view reports on all aspects of his/her projects on real time up-to-date information recorded in any of the modules that the user has access to. Reports are lists, summaries, and analyses of the data, which the user can display, print, export or save.

## Setup

| My Settings<br>This table includes some of the settings a user can customize. | |
|---|---|
| Personal Information | Update his/her profile, change password, delegate responsibilities (when away from the office) |
| Preferences | Apply notification settings |
| Subscriptions | Subscribe (or unsubscribe) to a folder or report |
| Views | Setup / maintain personal views for the different modules |

## Help

Each module has a help section located in the upper right hand of the screen [?].

Please email ebuilder@indiana.edu for any questions/comments needing eBuilder @ IU assistance.

# COST

When accessing the Cost module for a project, you are directed to its Cost Summary. Each project from the RFS system is imported with a $0 budget template and a 90 account funding rule.

| Financial Summary | |
|---|---|
| Cost Summary for | Click this drop-down arrow to switch to the Cost Summary for another project |
| Financial Summary | The Financial Summary shows detailed cost information for each line item in the budget. Click a line item link to open the Line Item Details page and view the dollar breakdowns that are totaled in the cost summary. You can also click the dollar amounts to view detailed information |
| Layout | Click this drop-down arrow to view the different layouts available for this financial summary. The columns that display on the cost summary are contingent on what is included in the cost summary layout. |
| Group By | Click this drop-down arrow to select a different view from which to see and group budget lines items by. |
| Export icon | Click to export the Financial Summary to a Microsoft Excel® spreadsheet as it is currently displayed |

## FUNDING SOURCES

The 90 account template is used for all projects. Every transaction will show against the 90 Account. As the funding department account is known, this funding source is added to the project. When transfers are made in KFS, the same accounts/amounts will be entered in as deposits and will appear in the Total Funds column.

## BUDGET DETAILS

A $0 budget template is approved before the cost summary becomes visible for the project. An original budget is needed before a project account number is given. The initial budget will be set when the Cost Opinion or the A/E of Record proposal is submitted. The budget will be updated (by the Team Lead or the business office) before bidding (part of the E02 – Bid Request Form process). The budget will be updated when construction is awarded (part of the E05 - Post-Bid Process). The system will keep track of all budget changes, and there will be reports run to compare current budget to original budget or budget to actual.

## COMMITMENTS

The commitments page displays all the consultant and contractor commitments along with the addendums and change directives for the project. As well as other KFS purchase orders requested.

| Tabs<br>This table includes most of the tabs displayed on a commitment. | |
|---|---|
| Commitment Overview | This tab gives you a quick overview of commitment. Use this tab to review general and basic information about the commitment such as the status, the commitment control, approval date |
| Other Details | Click this tab for the following information: commitment date, scope of work, default retainage percent and the notice to proceed date. |
| Financial Summary | A comparison of original values, pending, projected and approved changes, among other financial information can help you understanding the financial state of the commitment at a glance. |
| Commitment Changes | This tab lists all commitment changes for this commitment |
| Actual Costs Tab | This tab displays for approved commitments only and lists all invoice items that have been applied against this commitment. |
| Custom Fields | This tab displays any commitment custom fields that have been created for the account. |

## Actual Costs

Actual Costs are invoices paid to any party for goods or services on a project. Two types of invoices can be entered in e-Builder, general invoices and commitment invoices. Actuals that are not associated with a commitment (PP/CFS/EHS/UITS, etc.) are called general invoices.