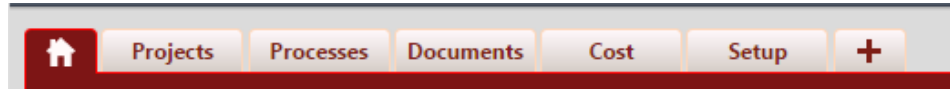


e-Builder at IU

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

The site login address is <https://app.e-builder.net/>.

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

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

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	<i>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.</i>
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.

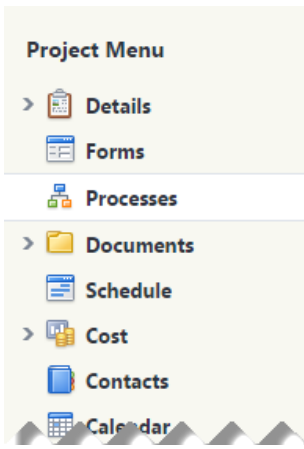
PROJECTS

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	
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	
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	
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
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	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	VDCFd	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	
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	
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/UTS, etc.) are called general invoices.