

E-BUILDER VENDOR FAQ

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FACILITIES WEBSITE VENDOR SIGN ON LINK

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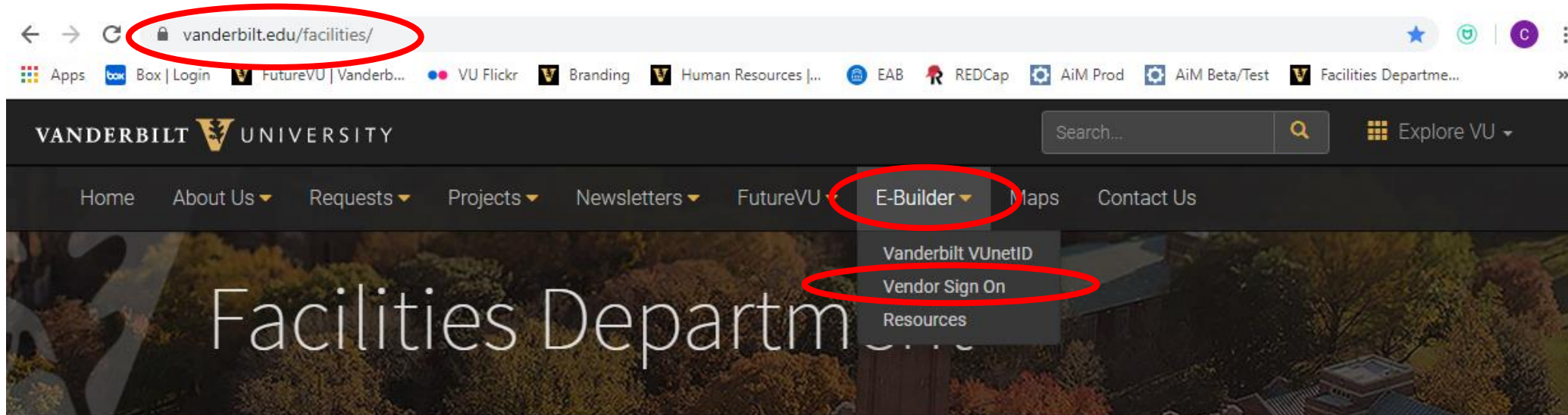
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OUR VISION: To be the **BEST** facilities department in the country by
PROVIDING OUTSTANDING, INNOVATIVE SERVICES to the community.



E-BUILDER MEMBER LOG IN

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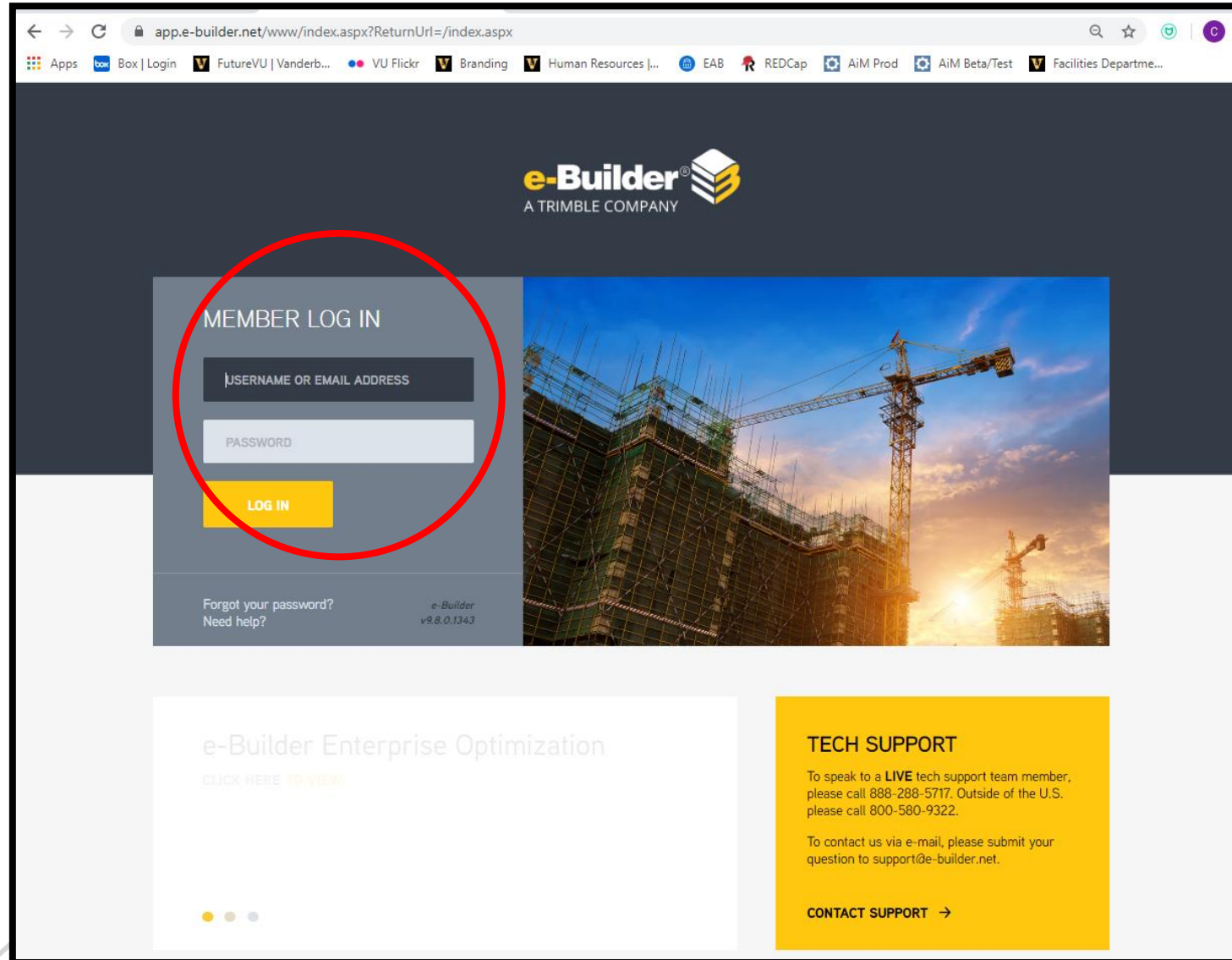
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app.e-builder.net/www/index.aspx?ReturnUrl=/index.aspx

Apps Box | Login FutureVU | Vanderb... VU Flickr Branding Human Resources |... EAB REDCap AiM Prod AiM Beta/Test Facilities Departme...

e-Builder
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MEMBER LOG IN

USERNAME OR EMAIL ADDRESS

PASSWORD

LOG IN

Forgot your password?
Need help?

e-Builder
v9.8.0.1343

e-Builder Enterprise Optimization
[CLICK HERE TO VIEW](#)

TECH SUPPORT

To speak to a **LIVE** tech support team member,
please call 888-288-5717. Outside of the U.S.
please call 800-580-9322.

To contact us via e-mail, please submit your
question to support@e-builder.net.

CONTACT SUPPORT →

E-BUILDER HOME SCREEN

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Switch to Classic style christina.fly

Home Dashboard Projects Planning Forms Processes Documents Calendar Contacts Bidding Cost Schedule Reports Setup

Christina Fly All Projects

Workflow in your court

| Project | Name | Subject | Step | Date Due | Requested Comment |
|---|----------------|--|---------------------|------------|-------------------|
| Branscomb: Munchie Market Renovation | Action Item #2 | ADD AE Vendor names to project | | 01.09.2020 | |
| Rand: Dining Servery Renovation | Action Item #1 | Add Project Participants | | 01.09.2020 | |
| FY20 R&R-B QUAD STAPLETON (8E) BATHROOM REMODEL | Action Item #2 | Monthly Project Status Update | | 01.13.2020 | |
| Kirkland Hall-Suite 411: Renovate Suite | CA - 6 | Test Commitment for issues with Company Contacts | Initiator Revise | | |
| *System Change Management | SCM - 16 | Add step to BAC process | eB Admin Assessment | | |

Forms | Processes

My first 10 tasks Show First ten

| Project | Task | Finish Date | % | Manager |
|--------------------|------|-------------|---|---------|
| There are no tasks | | | | |

Tasks

Submittal items in your court Filter by Actions All in my court Show First ten

| Project | Title | # | Rev # | Package # | Status | Due Date | Held By |
|--|-------|---|-------|-----------|--------|----------|---------|
| There are no submittal items in your court | | | | | | | |

Items Pending Approval Show First ten

| Project | Item Type | Item # | Approval Requested By | Date Approval Requested | Amount |
|--|-----------|--------|-----------------------|-------------------------|--------|
| There are no items pending approval for the selection. | | | | | |

Announcements

To Contact e-Builder Support:
Please call (888) 288-5717 or email support@e-builder.net. Thank you!

Tuesday, Jan 14, 2020

There are no events for today.

Calendar

Workflow in your court has items that you or someone in your role group need to act on.

Select the **Name** and e-Builder will bring you to the screen to act.

LOCATE A PROJECT FROM THE HOME SCREEN

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The screenshot shows the e-Builder Vendor CM home screen. The browser address bar displays `https://app.e-builder.net/da2/home/index.aspx`. The top navigation bar includes tabs for Dashboard, Projects, Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, Setup, and a plus icon. The 'Dashboard' tab is selected and circled in red. The main content area is titled 'Vendor CM' and contains several sections: 'Workflow in your court' (empty table), 'My first 10 tasks' (empty table), 'Submittal items in your court' (empty table), and 'Items Pending Approval' (empty table). A red arrow points to the 'All Projects' dropdown menu in the top right corner of the main content area. The left sidebar features the Vanderbilt University logo, a 'Recent Pages' section, a 'WATCH NOW' button for training videos, and a 'Quick Start' section with links to various forms and actions. The footer includes 'e-Builder Community | Product Ideas | About | Help' and a copyright notice: '©1995 - 2019 e-Builder, Inc. All Rights Reserved.'

Select the Project from the drop down box

ACCESS PROJECTS FROM ANY TAB DEPENDING ON WHAT YOU WANT TO DO

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The screenshot displays the e-Builder software interface. The top navigation bar includes tabs for Home, Dashboard, Projects, Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, Setup, and a menu icon. The 'Projects' tab is selected and highlighted with a red circle. Below the navigation bar, the 'Projects' section is visible. It features a dropdown menu for 'All Projects' (circled in red) and a table of projects. The table has columns for Project Name, City, State / Province, and Site Administrator. A red circle highlights the first few rows of the project list.

| Project Name | City | State / Province | Site Administrator |
|---|------|------------------|---------------------------|
| *Account Admin - Vanderbilt University | | | Implementation, e-Builder |
| *Implementation-Vanderbilt University | | | Implementation, e-Builder |
| *Integration Project | | | Implementation, e-Builder |
| *Master Project | | | Implementation, e-Builder |
| *New User Request | | | Implementation, e-Builder |
| *Project Intake | | | Implementation, e-Builder |
| *System Change Management | | | Implementation, e-Builder |
| *Template - Vanderbilt University | | | Implementation, e-Builder |
| 1025 16TH AVE - 3RD FLOOR CER: INSTALL L5-30R ELECTRICAL OUTLET | | | Implementation, e-Builder |

Select a project from the dropdown menu or the project list under the Projects Menu.

ONCE IN PROJECT USE THE PROJECT MENU IN THE LEFT COLUMN TO NAVIGATE WITH THE PROJECT

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The screenshot displays the e-Builder web application interface. The top navigation bar includes the e-Builder logo, a search bar, and a "Switch to Classic style" button. The user's name "christina.fly" and social media icons are visible on the right. The main navigation menu at the top includes links for Home, Dashboard, Projects, Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, and Setup. The left sidebar contains a "Project Menu" which is circled in red, along with other options like "Table of Contents", "Log in", "Home Screen-Workflow in your Court", "Processes – Invoice Approvals", "Processes – Potential Change Order", "Forms | Actions", "Documents", and "Help". The main content area shows "Project Details For 10004 - Kirkland Hall-Suite 411: Renovate Suite". The "Details" tab is active, displaying project information such as Project Name, e-Builder Project Administrator, Project Status, Address, Country, Start Date, Target Date, Description, Project Webcam, Last Modified By, and Date Last Modified. The "Custom Fields" tab is also visible, showing fields like Project Number, Organization, Oracle Project Number, Capital Plan Project ID, Program, Sub Program, Project Phase, Project Type, Project Description, Funding Source, and Building Name.

Project Details For 10004 - Kirkland Hall-Suite 411: Renovate Suite

Details

| | |
|---------------------------------|---|
| Project Name | Kirkland Hall-Suite 411: Renovate Suite |
| e-Builder Project Administrator | Implementation , e-Builder |
| Project Status | Canceled |
| (view map) Address | |
| Country | |
| Start Date | 01.29.2019 |
| Target Date | 09.15.2020 |
| Description | |
| Project Webcam | |
| Last Modified By | Newell, Tanish |
| Date Last Modified | 07.18.2019 |

No project photo uploaded.

Custom Fields (36) | Notes (0) | Documents (0) | Forms (0) | Processes (0) | Settings | Attached Viewpoints (0)

| | |
|--------------------------|---|
| Project Number: | 10004 |
| Organization: | 44200 - Financial Operations and Planning |
| Oracle Project Number: | |
| Capital Plan Project ID: | PR20.222 |
| Program: | |
| Sub Program: | |
| Project Phase: | On Hold |
| Project Type: | Renovation or Remodeling |
| Project Description: | |
| Funding Source: | Philanthropy Reserves |
| Building Name: | Kirkland Hall |

INVOICE APPROVAL

- Start by submitting the invoice to Oracle via email to invoices@vanderbilt.edu
 - Invoice must be legible, submitted in portrait orientation and include the following details (typed, not handwritten on the document):
 - Supplier name and address
 - Invoice date
 - Invoice number
 - Purchas order number
 - Description of the goods and/or services provided
 - Emails sent to the invoices@vanderbilt.edu email address may contain multiple attachments, but each attachment must include only one unique invoice.
- Next, submit invoice in e-Builder:
 - Start the Invoice Approval process in e-Builder using the steps on the following slides.
 - Ensure to attach the invoice submitted to Oracle in the e-Builder Invoice.

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Processes for 10004 - Kirkland Hall-Suite 411: Renovate Suite

Be sure you are on the correct project.

Choose Start Process.

Start Process

Project Menu

- Details
- Planning
- Forms
- Issues
- Processes**
- Documents
- BIM
- Schedule
- Cost
- Contacts
- Calendar
- Bidding
- Submittals

| Process | Subject | Step | In Step Since | Date Due | Status | Requested Comment |
|---------|--|------------------|---------------|----------|---------|-------------------|
| CA - 6 | Test Commitment for issues with Company Contacts | Initiator Revise | 01.03.2020 | | Pending | |

* To get to this page you can either start on the **Process** tab at the top then choose the project from the drop down menu next to **Process for:** OR you can start from the **Projects** tab and once in the project go to **Processes** under the project menu on the left.

CLICK THE PROCESS YOU WANT TO START

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Start a process on Kirkland Hall-Suite 411: Renovate SuiteThis screen pop's up after choosing **Start Process**

ProcessesCancel

| Process Name | Description |
|--|--|
| Budget Approval or Change (BAC) | The purpose of this process is to approve a budget for a new project or change a budget for an existing project. |
| Change Order (CO) | The purpose of this process is to bundle and route changes orders for approval. |
| Commitment Approval (CA) | The purpose of this process is to route contracts for review and approval. |
| Invoice Approval (IA) | The purpose of this process is to route invoices for review and approval. |
| Monthly Project Status Update (MPSU) | The purpose of this process is to create a monthly project status update on the 2nd Monday of the month. |
| Potential Change Order (PCO) | The purpose of this process is to route potential changes for approval |
| Request for Information (RFI) | Used for requesting information from architects/engineers |

Cancel

INVOICE APPROVAL



Invoice Approval (IA)

Start Process

Print Check Spelling Submit Save Draft Cancel

Project: Kirkland Hall-Suite 411: Renovate Suite
Project Number: 10004
Process: Invoice Approval
* Subject:

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

Invoice Details

* Invoice Date:
* Vendor Invoice #:
Work Completed From:
Work Completed To:
* Vendor Invoice: or

Commitment Invoice Details

Status: Draft
* Commitment:
Company/Contact:
* Date Received: [01.13.2020]
This is a retainage release: ☐

Date Due:

Commitment Invoice Custom Fields

Payment Reference:
Amount Paid:

Invoice Items

| Commitment Item # | Description | Budget Line Item | Current Quantity | Current Commitment | Quantity Invoiced To Date | Invoiced To Date | Retained To Date | Remaining Quantity | Remaining to be Invoiced | Unit Cost | Unit of Measure | Quantity | Invoice Amount | Retainage % | Retained This Invoice | Custom Field(s) |
|-------------------|-----------------------------|-------------------|------------------|--------------------|---------------------------|------------------|------------------|--------------------|--------------------------|------------|-----------------|----------|----------------|-------------|-----------------------|-----------------|
| 001 | Kitchen Design Deliverables | 01.CPARCHENGR.010 | 15.0000 | 18,000.00 | 0.0000 | 0.00 | 0.00 | 15.0000 | 18,000.00 | 1,200.0000 | EA | 0.0000 | 0.00 | 0.00 % | 0.00 | |
| 002 | Kitchen Design | 01.CPARCHENGR.030 | 1,200.0000 | 384,000.00 | 0.0000 | 0.00 | 0.00 | 1,200.0000 | 384,000.00 | 320.0000 | HR | 0.0000 | 0.00 | 0.00 % | 0.00 | |
| Total | | | 1,215.00 | 402,000.00 | 0.00 | 0.00 | 0.00 | 1,215.00 | 402,000.00 | | | 0.00 | 0.00 | | 0.00 | |

Print Check Spelling Submit Save Draft Cancel

It is essential that the Vendor Invoice # matches the Invoice number on the invoice emailed to invoices@vanderbilt.edu exactly. Overnight, e-Builder and Oracle will communicate, and these matching numbers link them up in both systems.

The commitment must be selected before the Invoice Items appear

Be sure to enter the invoice amount under the correct Commitment Item #

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SELECT THE TYPE OF PROCESS YOU WANT TO REVIEW

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Switch to Classic style

christina.fly

Home Dashboard Projects Planning Forms **Processes** Documents Calendar Contacts Bidding Cost Schedule Reports Setup

Processes for 10004 - Kirkland Hall-Suite 411: Renovate Suite

Unfinished Drafts | Import Processes

Filter Processes

Search In: ☐ Processes Initiated By Me ☐ Processes In My Court ☒ All Processes

Type of Process: **All Processes** (dropdown menu open showing: All Processes, Budget Approval or Change (BAC), Change Order (CO), Commitment Approval (CA), Invoice Approval (IA), Monthly Project Status Update (MPSU), Potential Change Order (PCO), System Change Management (SCM))

Status: ☒ Draft ☒ Open ☒ Finished

Containing Text:

Filter

Start Process

| Process | Subject | Step | In Step Since | Date Due | Status | Requested Comment |
|---------|--|------------------|---------------|----------|---------|-------------------|
| CA - 6 | Test Commitment for issues with Company Contacts | Initiator Revise | 01.03.2020 | | Pending | |

REVIEW PENDING INVOICE APPROVALS

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Filter Processes

Search In: ☐ Processes Initiated By Me ☐ Processes In My Court ☒ All Processes

Type of Process: ☒ Draft ☒ Open ☒ Finished

Status:

Step Name:

Containing Text:

[Unfinished Drafts](#) | [Import Processes](#)

[Start Selected Process Type](#) [Start Process](#)

[Filter](#)

Processes **Reports (1)**

| <input type="checkbox"/> | Process | Subject | Step | In Step Since | Date Due | Status | Requested Comment |
|--------------------------|---------|---------------------------------------|--------|---------------|----------|----------|-------------------|
| <input type="checkbox"/> | IA - 3 | Layton Construction - Invoice #18-965 | Finish | 01.30.2019 | | Approved | |
| <input type="checkbox"/> | IA - 2 | Cherry Invoice #5 | Finish | 01.30.2019 | | Approved | |
| <input type="checkbox"/> | IA - 1 | Sherwin Williams - Invoice #5567 | Finish | 01.30.2019 | | Approved | |

Search processes to determine where they are in the process

Select the process to see details.

INVOICE APPROVAL PROCESS STATUS

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Invoice Approval (IA) - 2

Workflow Override All Fields View

Print Copy Comment Cancel

Project: Kirkland Hall-Suite 411; Renovate Suite
Process Document: IA - 2
Current Workflow Step: Finish
Subject: Cherry Invoice
Status: Approved

Project Number: 10004
Overall Due Date:
Step Due Date:

Invoice Details

Invoice Date: 01.25.2019
Vendor Invoice #: 5
Work Completed From: 01.22.2019
Work Completed To: 01.22.2019
Vendor Invoice: Invoice # Craw Comm Aug18.pdf (version 1)
Properties | Download (13.0KB) | Redline

Commitment Invoice Details

IA - 2

Graphical View

Look for highlighted step

Start → Submit → OPO? → Pay App? → A/E Review → BOC Review → PM Review/Approval → Finish

Revisions: Revise, Resubmit, Void

Approved: Approved

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Routing History

Routing History History

Details Show Workflow Cancel

Name: IA - 2
Status: Approved

Steps

| # | Step Name | Actor | Action | Due Date | Completed | Age(d) | Status |
|---|--------------------|-----------------|----------|---------------------|-----------|--------|-----------|
| 1 | Start | Melissa Skopak | Submit | 01.30.2019 09:47 AM | | | Completed |
| 2 | OPO? | | false | 01.30.2019 09:47 AM | | 0 | Completed |
| 3 | Pay App? | | false | 01.30.2019 09:47 AM | | 0 | Completed |
| 4 | PM Review/Approval | Julie Covington | Approved | 01.30.2019 09:49 AM | | 0 | Completed |
| 5 | Finish | | | | | | Finished |

Data Fields (6) Comments (0) Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached Viewpoints (0)

| Data Field | Edit User | Edit Date | Old Value | New Value |
|---------------------|----------------|--------------------|-----------|-------------------------------|
| Subject | Melissa Skopak | 01.30.2019 09:47AM | | Cherry Invoice #5 |
| Invoice Date | Melissa Skopak | 01.30.2019 09:47AM | | 01.25.2019 |
| Vendor Invoice | Melissa Skopak | 01.30.2019 09:47AM | | Invoice # Craw Comm Aug18.pdf |
| Vendor Invoice # | Melissa Skopak | 01.30.2019 09:47AM | | 5 |
| Work Completed From | Melissa Skopak | 01.30.2019 09:47AM | | 01.22.2019 |
| Work Completed To | Melissa Skopak | 01.30.2019 09:47AM | | 01.22.2019 |

INVOICE APPROVAL

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Invoice Approval (IA) - 15

| | | | |
|------------------------|--|-------------------|----------|
| Project: | *Testing Project Vanderbilt University | Project Number: | TSTPRJVV |
| Process Document: | IA - 15 Show History Current Action | Overall Due Date: | |
| Current Workflow Step: | Finalize Show Workflow Diagram | Step Due Date: | |
| Subject: | Fort Hill Associates Invoice 240 567 | | |
| Status: | Paid | | |

Details | Comments (1) | Attached Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0) | Attached Viewpoints (0)

Invoice Details

| | |
|----------------------|---|
| Invoice Date: | 06.28.2019 |
| Vendor Invoice #: | 240 567 |
| Work Completed From: | |
| Work Completed To: | |
| Vendor Invoice: | Test Invoice Fort Hill Inv 240 567.docx (version 1) Properties Download (36.1KB) Thumbnail |

The Date Paid, Payment Reference # and Amount Paid can be found here

Commitment Invoice Details

| | | | |
|------------------------------|---|-----------|----------------------------|
| Status: | Paid | Approved: | 06.28.2019 (Justin Grimes) |
| Commitment: | CA - 00031 - Testing 6/7 - Test #1 (second attempt) | Paid: | 07.01.2019 |
| Company/Contact: | Fort Hill Associates LLC (000000021148263 Default PO) | Date Due: | |
| Date Received: | 06.28.2019 | | |
| This is a retainage release: | <input type="checkbox"/> | | |

Commitment Invoice Custom Fields

| | |
|--------------------|----------|
| Payment Reference: | 1329991 |
| Amount Paid: | \$ 156.3 |

Invoice Items ☐ Show Approved Commitment Items

| Commitment Item # | Description | Budget Line Item | Current Commitment | Invoiced To Date | Retained To Date | Remaining to be Invoiced | Invoice Amount | Retainage % | Retained This Invoice | Custom Field(s) |
|-------------------|-----------------------------------|--------------------|--------------------|------------------|------------------|--------------------------|----------------|-------------|-----------------------|-----------------|
| 4-001 | Demountable Partitions | 02.CPCONSTRUCT.080 | 7,500.00 | 5,000.25 | 0.00 | 2,499.75 | 5,000.25 | 0.00 % | 0.00 | |
| 4-002 | Furniture Design | 10.SVSGTH.410 | 82.00 | 56.01 | 0.00 | 25.99 | 56.01 | 0.00 % | 0.00 | |
| 4-003 | Furniture Under \$5,000 Per Piece | 07.NONCAPEQ.330 | 343.00 | 100.40 | 0.00 | 242.60 | 100.40 | 0.00 % | 0.00 | |
| Total | | | 7,925.00 | 5,156.66 | 0.00 | 2,768.34 | 5,156.66 | | 0.00 | |

TO START A POTENTIAL CHANGE ORDER

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Unfinished Drafts | Import Processes

Start Process

Filter Processes

Search In: ☐ Processes Initiated By Me ☐ Processes In My Court ☒ All Processes

Type of Process: ☒ Draft ☒ Open ☐ Finished

Status:

Containing Text:

Filter

| Process | Subject | Step | In Step Since | Date Due | Status | Requested Comment |
|---------|--|------------------|---------------|----------|---------|-------------------|
| CA - 6 | Test Commitment for issues with Company Contacts | Initiator Revise | 01.03.2020 | | Pending | |

CLICK POTENTIAL CHANGE ORDER

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Start a process on Kirkland Hall-Suite 411: Renovate Suite

ProcessesCancel

| Process Name | Description |
|--|--|
| Budget Approval or Change (BAC) | The purpose of this process is to approve a budget for a new project or change a budget for an existing project. |
| Change Order (CO) | The purpose of this process is to bundle and route changes orders for approval. |
| Commitment Approval (CA) | The purpose of this process is to route contracts for review and approval. |
| Invoice Approval (IA) | The purpose of this process is to route invoices for review and approval. |
| Monthly Project Status Update (MPSU) | The purpose of this process is to create a monthly project status update on the 2nd Monday of the month. |
| Potential Change Order (PCO) | The purpose of this process is to route potential changes for approval |
| Request for Information (RFI) | Used for requesting information from architects/engineers |

Cancel

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Potential Change Order (PCO)
(Auto-Saved 06-02-2019 1:20 PM)

Start Process

Project: *Training - Vanderbilt University
Project Number:
Process: Potential Change Order
Subject: [Change Order Increase/Decrease Example]

Details | Attached Documents (0) | Attached Processes (0) | Attached Factors (0) | Attached Viewpoints (0)

Description of Change: [For design services increase as an example]
Time Impact in Working Days: [0]
CM Start: Yes

Complete all areas with an asterisk

Click Add All Existing Items, and make changes where necessary

**Do not enter additional scope items, use your existing line items.
If a new scope item is needed, please contact your Project Manager.**

Commitment Change Details

Commitment: 1 - Architect Contract
Status: Draft
Created: 06-02-2019 (Vendor CM)
Date Of Change: 06-02-2019
Company: *Sample Company
Reason Code: [Commitment Progress (Original)]

Commitment Change Custom Fields

There are no commitment change custom fields.

Commitment Change Items

| # | Commitment Item | Description | Budget Line Item | Retainage Percent | Current Commitment Amount | Change Amount | Net Commitment Amount | Custom Field(s) |
|--------|-----------------|---------------------------|------------------|-------------------|---------------------------|---------------|-----------------------|-----------------|
| Delete | 001 | DRAFT - 01.CPARCHENGR.D10 | Basic Services | 0.00 | 0.00 | 1,500.00 | 1,500.00 | |
| Total | | | | | 0.00 | 1,500.00 | 1,500.00 | |

Download Schedule of Values Template | Import Schedule of Values | Add All Existing Items | Add Existing Item

COMPLETE PCO

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Do not enter additional scope items, use your existing line items.
If a new scope item is needed, please contact your Project Manager.

Commitment Change Details

| | | | |
|-----------------|------------------------|--------------|--------------------------------|
| Commitment: | 1 - Architect Contract | Company: | *Sample Company |
| Status: | Draft | | |
| Created: | 05.02.2019 (Vendor CM) | | |
| Date Of Change: | 05.02.2019 | Reason Code: | Commitment Progress (Original) |

Commitment Change Custom Fields

There are no commitment change custom fields.

Commitment Change Items

| | # | Commitment Item | Description | Budget Line Item | Retainage Percent | Current Commitment Amount | Change Amount | Net Commitment Amount | Custom Field(s) |
|--------|-----|----------------------------|-----------------------|--------------------|-------------------|---------------------------|---------------|-----------------------|-----------------|
| Delete | 001 | DRAFT - 01.CFARCH-ENGR.010 | Basic Services | 01.CFARCH-ENGR.010 | 0.00 | 0.00 | 1,500.00 | 1,500.00 | |
| Delete | 002 | 001 | Basic Services | 01.CFARCH-ENGR.010 | 0.00 | 200,000.00 | 0.00 | 200,000.00 | |
| Delete | 003 | 002 | Reimbursables | 01.CFARCH-ENGR.020 | 0.00 | 25,000.00 | 0.00 | 25,000.00 | |
| Delete | 004 | 003 | Specialty Consultants | 01.CFARCH-ENGR.030 | 0.00 | 350,000.00 | 0.00 | 350,000.00 | |
| Total | | | | | | 575,000.00 | 1,500.00 | 576,500.00 | |

Add Additional Scope Commitment Item

Item Number: 005
Account Code: Please Select a Line Item
Commitment Item:
Description:
Retainage Percent: 0.00
Change Amount: 0.00
Custom Field(s):
Add

Do not use this area, if an item you need is not listed above after adding all items, contact your Project Manager for assistance

Print Copy Check Spelling Show Workflow Submit Save Draft Delete Draft Cancel

FORMS | ACTIONS

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The screenshot shows the e-Builder interface for Vanderbilt University. The sidebar on the left contains a 'Project Menu' with options: Details, Planning, **Forms** (circled in red), Issues, Processes, Documents, BIM, and Schedule. The main content area is titled 'Forms for 10004 - Kirkland Hall-Suite 411: Renovate Suite'. It includes a 'Filter Forms' section with search criteria and a 'Workflow and Static Forms' table. The table has columns: Subject, Prefix, #, Author, Held By, Due Date, and Status. Below the table, it states 'There are no forms that meet your filter criteria.' Annotations include an arrow pointing to the search bar with the text 'Search forms on a project here.' and another arrow pointing to the 'Fill Out Form' button with the text 'Select **Fill Out Form** to create a new form.'

Forms for 10004 - Kirkland Hall-Suite 411: Renovate Suite

Filter Forms

Search In: Forms Initiated By Me Forms In My Court All Forms

Type of Form: All Workflow and Static Forms Draft Open Closed

Containing Text: anywhere in the form

Workflow and Static Forms

| Subject | Prefix | # | Author | Held By | Due Date | Status |
|--|--------|---|--------|---------|----------|--------|
| There are no forms that meet your filter criteria. | | | | | | |

Page 1 of 1 Show 25

SELECT THE FORM YOU WISH TO USE

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Fill out form on Kirkland Hall-Suite 411: Renovate Suite

Workflow Forms Cancel

| Form Type | Description |
|--|--|
| Action Item | Form used to request an action from another project team member. Response is required to the initiator of the form instance to close |
| Communications - Bulletin | A Bulletin is a quick announcement from an official source about an important piece of news on a project. |
| Communications - Project Issue | Project Issue form is used to identify and communicate project issues/changes that arise. |
| Communications - Reprographer Request | Reprographer Request is used to request a print or photocopy of a document from the reprographer room. |
| Communications - Request for Clarification | used in the bidding phase of a project to clarify bid documents and specs |
| Communications - Request for Shutdown | The Request for Shutdown form is used to request a utility shutdown for a limited period. |
| Communications - Submittal Package Cover Sheet | Submittal Package Cover Sheet is used to provide a cover sheet for a Submittal Package. |
| Communications - Submittal Transmittal | Submittal Transmittal is used to provide the recipient with a brief description of the contents enclosed as part of a shipment or piece of communication. |
| Communications - Substantial Completion | Substantial Completion can be used by a Contractor to certify that the substantial work has been completed on a construction project in accordance with the contract documents and only minor items remain. |
| Communications - Transmittal Cover Sheet | A Transmittal Cover Sheet accompanies a larger item, usually a document. It provides the recipient with a specific context in which to place the larger document and simultaneously gives the sender a permanent record of having sent the material. |
| Cost - Back Charge Notification | The Back-Charge Notification (BCN) is to be submitted to the General Contractor by the Owner formally placing the General Contractor on notice that a back charge claim is pending. The BCN can also be used by the Contractor to address back charge claims amongst Subcontractors. The origins of a potential back charge can be associated with but is not limited to a Non-Conformance Notice, Quality Control Notice, and/or Construction Change Directive. |
| Cost - Budget Change Approval | Budget Change Approval form is used to receive approval for a budget increase. |
| Cost - Change Order (CO) | A Change Order (CO) is work that is added to or deleted from the original scope of work of a contract, which alters the original contract amount and/or completion date. |
| Cost - Construction Change Directive (CCD) | Construction Change Directive (CCD) is an alternate mechanism for directing the contractor to perform additional work to the contract when time and/or cost of the work is not in agreement between the owner and contractor performing the work. |
| Cost - Contractor's Notification of Change | Contractor's Notification of Change form is used by the Contractor to request a change in scope due to different site conditions, extra work, or other events which may affect the contractor's time and cost to complete the project. |
| Cost - Field Order | Field Order is issued for work less than \$5,000 that needs to commence without delay. It is meant to provide directive to start work when comprehensive pricing is not available. |
| Cost - Potential Change Order (PCO) | The Potential Change Order (PCO) is to be formally submitted to the Owner by General Contractor with a detailed cost breakdown and supporting documentation. The Owner is responsible for reviewing the COB and either accepting the claim for issuance of a Change Order to the General Contractor or rejecting the claim as included in the General Contractor's base work scope. |
| HR - Expense Report Approval | Expense Report Approval form is used to route expense reports for approval. |
| HR - Vacation Request | Vacation Request form is used to route vacation request for approval. |
| Integration - New Project Request | New Project Request form is used to request a project |
| Integration - New User Request | New User Request is used to gather prudent information to add a new user to e-Builder. |
| Meeting Minutes Action Item | |

<https://app.e-builder.net/da2/Home/Index.aspx>

COMPLETE FIELDS TO SEND AN ACTION ITEM TO ANOTHER PARTICIPANT

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The screenshot shows the 'e-Builder' web application interface, titled 'Fill Out Form'. The header includes the e-Builder logo and navigation icons. The form is for a project named 'Kirkland Hall-Suite 411: Renovate Suite' with project number '10004'. The form type is 'Action Item' and the author is 'Christina Fly'. The form includes fields for 'Counter Prefix', 'Priority' (set to 'Normal'), 'Subject', 'Send To' (with a dropdown for 'All Roles' and a 'Select Recipient' dropdown), 'Date Due', and 'CC' (with a list of roles: Core Team, eB Admin, Hold Step, Members, Vendor-AE, Vendor-CM). There is a checkbox for 'Request external comment after posting?'. The bottom section has tabs for 'Action Item', 'Attached Files', 'Attached Forms', and 'Attached Viewpoints'. The 'Action Item' tab shows fields for 'Action Requested' and 'Action Response'.

e-Builder
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Fill Out Form

Print Check Spelling Post Form Save Draft Cancel

Project: Kirkland Hall-Suite 411: Renovate Suite
Project Number: 10004
Form Type: Action Item
Author: Christina Fly
Counter Prefix:
Priority: Normal
* Subject:
* Send To: Select From: All Roles --Select Recipient--
* Date Due:
CC: -- Roles --
Core Team
eB Admin
Hold Step
Members
Vendor-AE
Vendor-CM
Request external comment after posting? ☐

Action Item Attached Files Attached Forms Attached Viewpoints

* Action Requested:
Action Response:

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e-Builder
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Switch to Classic style christina.fly

Home Dashboard Projects Planning Forms Processes **Documents** Calendar Contacts Bidding Cost Reports Setup

Documents for 10004 - Kirkland Hall-Suite 411: Renovate Suite 0 Files Checked Out For Editing

Folders

- Documents[34]
 - 00 Email In[0]
 - 01 Project Admin[0]
 - 02 Financials[16]
 - 03 Bidding[15]
 - 04 Design[0]
 - 05 Fixed and Movable Equipment[0]
 - 06 Permits - Haz Mat[0]
 - 07 Logistics[2]
 - 08 Construction[0]
 - 09 Commissioning[0]
 - 10 Sustainability[0]
 - 11 Close Out[0]

Documents

| Name | Date Uploaded | Uploaded By | Company |
|--|------------------|--------------------------|-----------------|
| 1X-XXXX-Project Bid template.rtf (version 1) Download (24.2KB) Deadline Compare With Send Properties Edit | 01.29.19 09:45AM | e-Builder Implementation | e-Builder, Inc. |

Project Menu

- Details
- Planning
- Forms
- Issues
- Processes
- Documents**
 - Access History
 - Sent Items
 - Document Log
 - Folder

In Documents, you can review all documents available. You can also upload information on the project to be stored for later use in processes or reference.

Documents are organized by topic

HELP

For help, you have 3 options:

1. Click the “?” at the top right corner of the screen to get help with basic navigation.
2. Contact e-Builder support at (888) 288-5717 or support@e-builder.net. You can also find this information under the “?” on the e-Builder Home page.
3. Contact your VU Facilities Project Manager or e-Builder Administrator.

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The screenshot displays the e-Builder Vendor CM interface. The top navigation bar includes links for Dashboard, Projects, Planning, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, Setup, and a plus sign. The main content area is titled "Vendor CM" and features several sections: "Workflow in your court" (empty table), "My first 10 tasks" (empty table), "Submittal items in your court" (empty table), and "Items Pending Approval" (empty table). The left sidebar contains the Vanderbilt University logo, a "Recent Pages" list, a "TRAINING VIDEOS ON-DEMAND" section, and a "Quick Start" list. The right sidebar shows an "Announcements" section with a "To Contact e-Builder Support" message and a "Calendar" section. A red arrow points to a question mark icon in the top right corner of the interface.