



General Navigation – Getting Started



Members Login

Username or Email Address:

Password:

[Forgot your password?](#)
[Need Help?](#)

1

1. **LOGIN** (<https://www.e-builder.net/>). Enter user name and password. Select Login button.



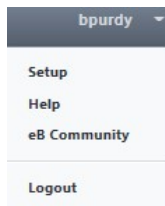
2

2. In the standard header of e-Builder, at the top of the page, there is a 'Search' box. With this function you can search for almost anything in the product such as contacts, bidders, documents, etc. Certain words are ignored (See e-Builder Help for more details). This searches both files and folders.



3

3. Use the Like and Dislike buttons to inform e-Builder about certain features your opinion. A popup will appear to provide additional comments.



4

4. Select your login dropdown and navigate to the Setup/My Settings page, e-Builder Help, e-Builder Community website, or simply logout of e-Builder



5

5. As another option for Help, select the (?) question mark icon and launch the e-Builder Online User Assistance Help menu. View the Contents.



6

6. Click on the blue tabs to navigate and view Global Program Account information across your project portfolio.



General Navigation - Project Menu



To display the Project Menu, you must select a project first. To select a project, follow any one of these steps:

1. **Home Tab:** Drill into the project from the Workflow in your court
2. As an alternative to access your project, select a Global Account Tab and **Please select a project...** from dropdown.

Project	Name	Subject	Step	Date Due	Requested Comment
eB Implementation	Action Item #4	Brett to setup meeting with Detroit Training and deliver logistics for plugins, etc..		04.25.2014 12:00am	
eB Implementation	Action Item #13	One Paggers		05.01.2014 12:00am	
*Training Docs - Ascension Health	Action Item #3	Draft a Adoption Skill Assesment Dashboard		05.02.2014 12:00am	

1
Please select a project... dropdown is available on most Global Account Tabs

2
Home tab and Workflow in your court project selection

3
4
Project Menu pane. Navigate all modules under the Project Menu

5
Cost
Cost Summary
Funding Sources
Budget Details
Forecasts
Commitments
Actual Costs
Cash Flow

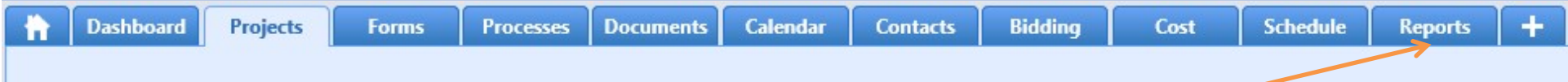
3. **Recent Pages:** Select the dropdown to view a list of recent e-Builder pages you have visited

4. **Project Menu** is displayed in the left menu of the screen.

5. Click on the arrow or the name of the module (i.e. Cost) to expand a module containing other sub feature selection options

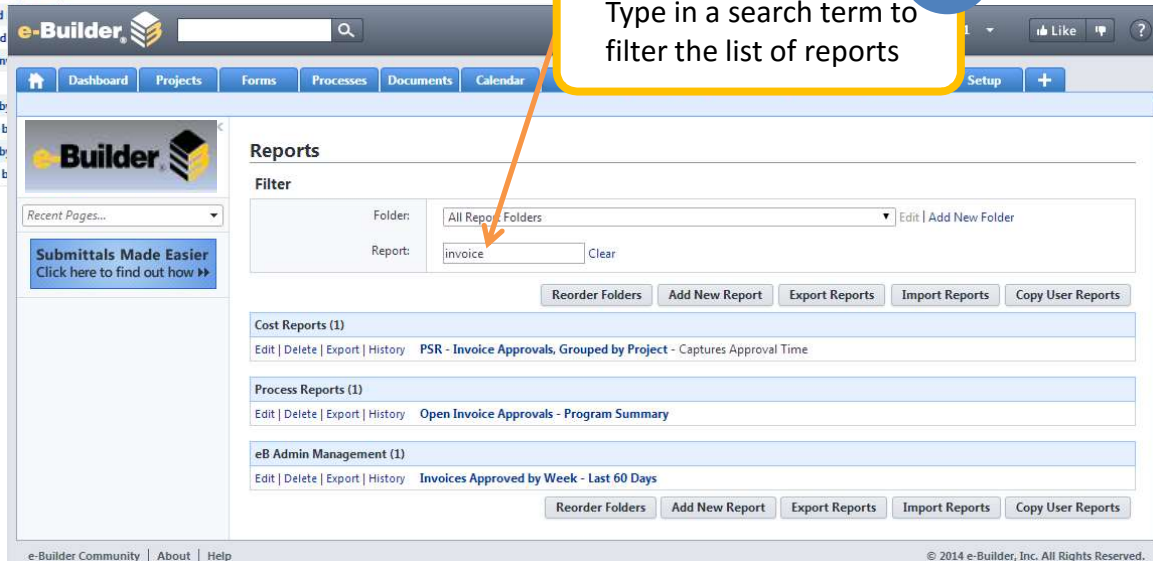
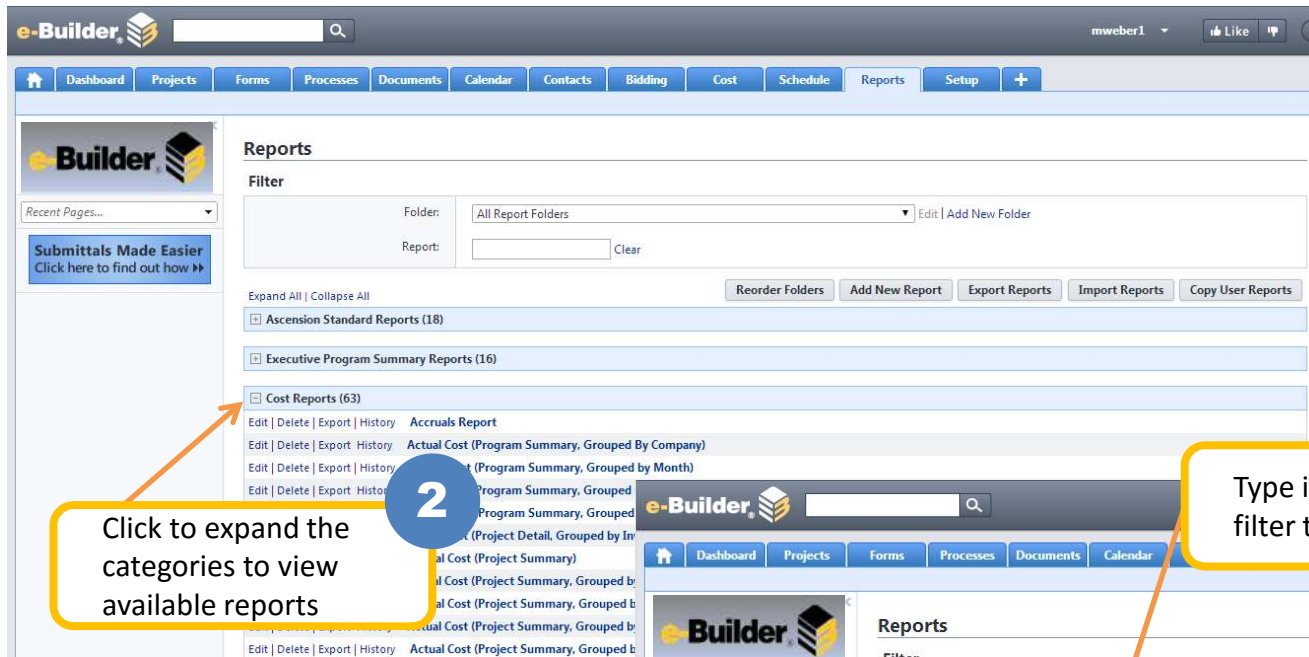


General Navigation - Reports



To access the Reports module and locate a report:

1. Select the Reports tab from the Global navigation at the top of the screen.
2. Expand the Categories to view available reports, or
3. Search for a report based on a text search of the report name.





General Navigation - Dashboards

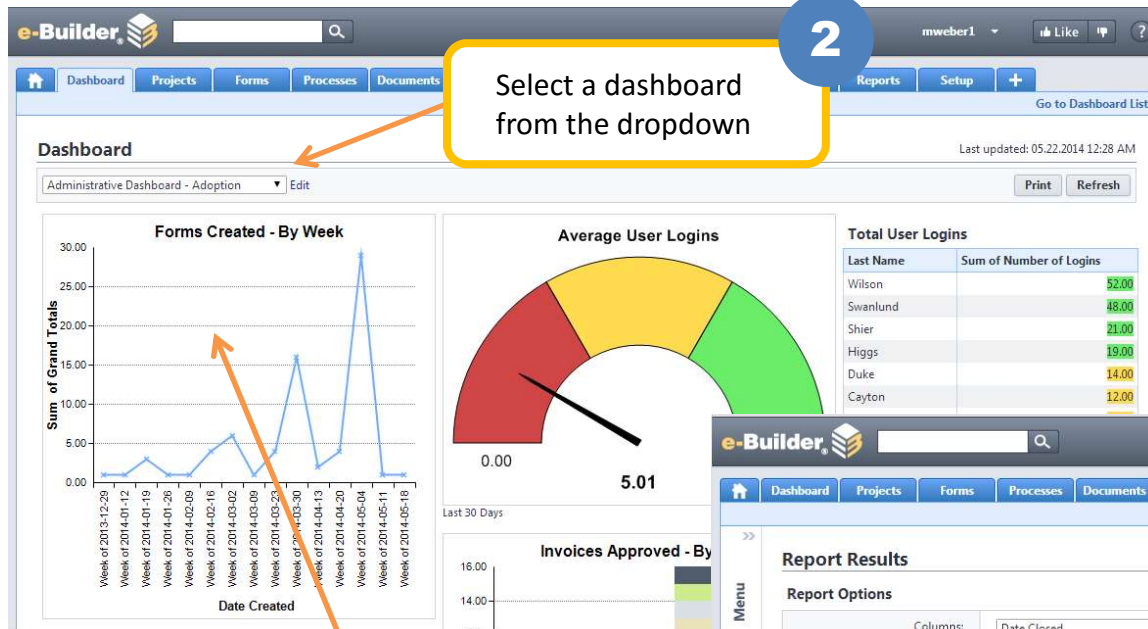


To access the Dashboard module and locate a dashboard:

1. Select the Dashboard tab from the Global navigation at the top of the screen.
2. Select a dashboard from the dropdown
3. Click on a dashboard item to view the underlying report (all dashboard items are driven by a report).

Dashboard Tab

1

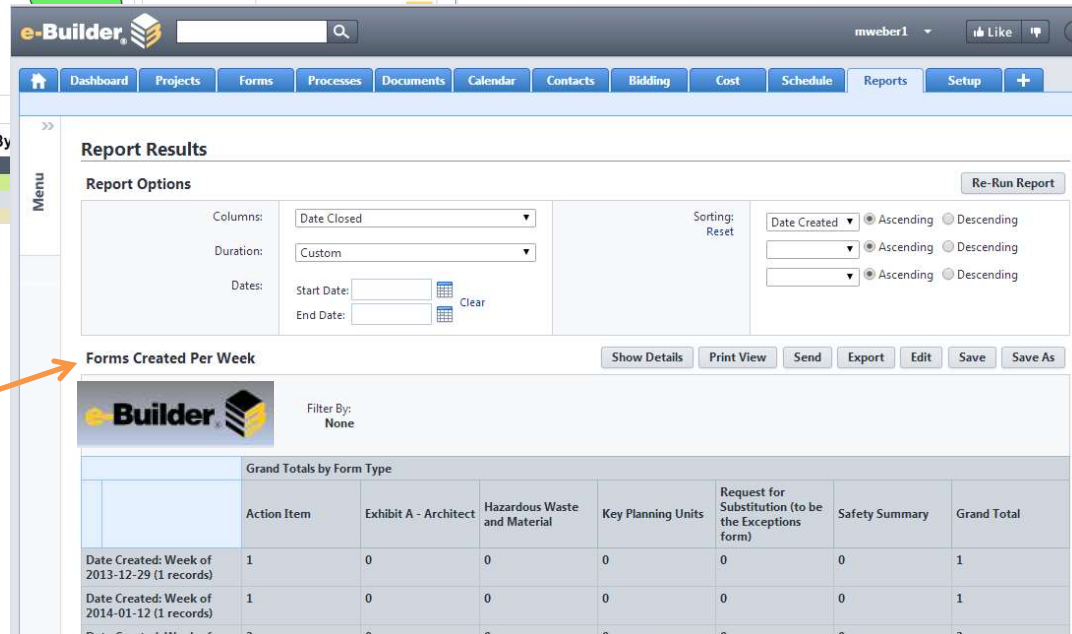


Select a dashboard from the dropdown

2

Click on a dashboard item to view the underlying report

3





General Navigation - Home Page



Home Screen:

1. Divided into specific areas that consist of
 - a. Module Tabs
 - b. Logo & Announcements Section
 - c. Calendar & Events
 - d. Help
 - e. Enter Text & Search
 - f. Like & Dislike buttons.

Home Screen (Continued):

2. **Work in your court:** Tells you what actions are needed by you to be addressed. You can click on the task listing in the Project section of "Workflow in your court"
3. **Work in your court:** To change the sort order, click on the header title you would like to sort on
4. Click on the Project selection drop down listing about the view section. Choose the project you want to access.

The screenshot shows the e-Builder Home Page with various annotations and callouts:

- 1e**: Points to the search bar.
- 1a**: Points to the 'Forms' tab.
- 4**: Points to the 'Project Selection' dropdown menu.
- Calendar & Events**: Points to the 'Calendar' tab.
- 1c**: Points to the 'Calendar & Events' section.
- 1f**: Points to the 'Like' button.
- 1d**: Points to the 'Help' button.
- 3**: Points to the 'Project' header in the 'Workflow in your court' section.
- 2**: Points to the 'Name' column header in the 'Workflow in your court' table.
- 1b**: Points to the 'Logo's & Announcements Section'.

Project Selection is visible across most global tabs to connect you to your project

If you click the item 'Name', a pop up window appears so you can open/complete the item within the project without the need to navigate to the project.

Work you need to take action on

Logo's & Announcements Section

Workflow in your court

Project	Name	Subject	Requested
Process Testing	COM - 2	- Pay	

My first 10 tasks

Project	Task	Finish Date

Submittal items in your court

Project	Title	#	Rev #	Package

Items Pending Approval

Project	Item Type	Item

Next Week's Events

April 2014

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

There are no events in the selected range.

Calendar



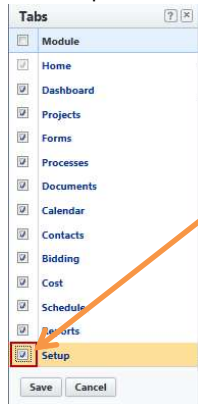
General Navigation - Settings – My Profile

Home Screen:

1. Change Module Listing by adding the Setup Module to the menu tab by Clicking the + sign depicted below.

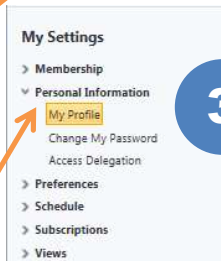


2. From drop down listing select Setup by clicking on the box next to it on the drop down.



Click in this box

2

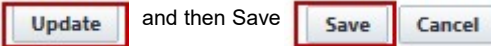


Click Personal Information/ My Profile to view and edit Your Profile Settings

My Settings:

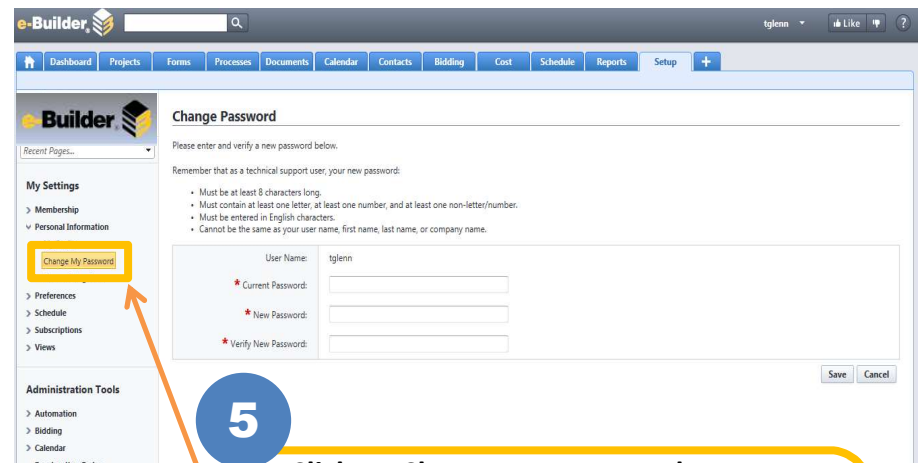
3. Expand Personal Information and My Profile from the My Setting area and then select My Profile

4. Update your **Member Profile** and **Business Information**. You can update your profile by clicking the **Update** box



Click on Update to edit Your Profile Settings

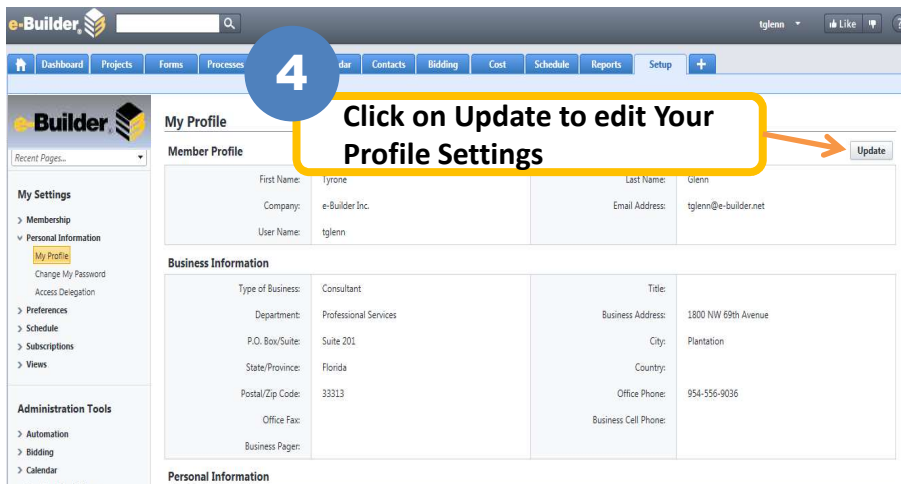
5. At Personal Information under **My Setting** area, select **Change My Password**.



Click on Change My Password.

Enter your Current Password, New Password, and Verify New Password.

Click Save



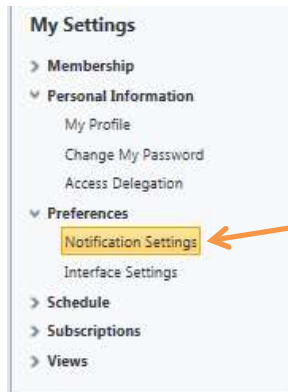
General Navigation - Settings - Notifications

1) Home Screen:

- From a privileged PM account, select the **Setup** module.



- On the left side, select **Preferences/Notification Settings** from **My Settings**.



2

Click **Preferences/Notification Settings** to view and edit the Notification Time Zone

Click on Setup

1

Notification Settings

Notification Time Zone:	(GMT-05:00) Eastern Time (US & Canada)	Update
Disable CC Notifications From Workflow Forms:	No	
Receive Form Closed Notifications:	Yes	
Include Recipient List in Form Notifications:	No	
Include Form Fields in Form Notifications:	Yes	
Include Only the Most Recent Comment in Form Notifications:	No	
Receive Calendar Event Reminders:	Yes	
Notification Email Format:	HTML	
Email-In Notifications:	All	

- Update your **Notification Time Zone** by clicking the **Update** box

Update

- Select your specific **Notification Time Zone** from the dropdown:

Notification Time Zone:	(GMT-05:00) Eastern Time (US & Canada)
	(GMT-05:00) Eastern Time (US & Canada)

- Save **Save** **Cancel** after selection of your **Notification Time Zone**

3

You can now set the time zone so email notifications sent to you will reflect your specific time zone.