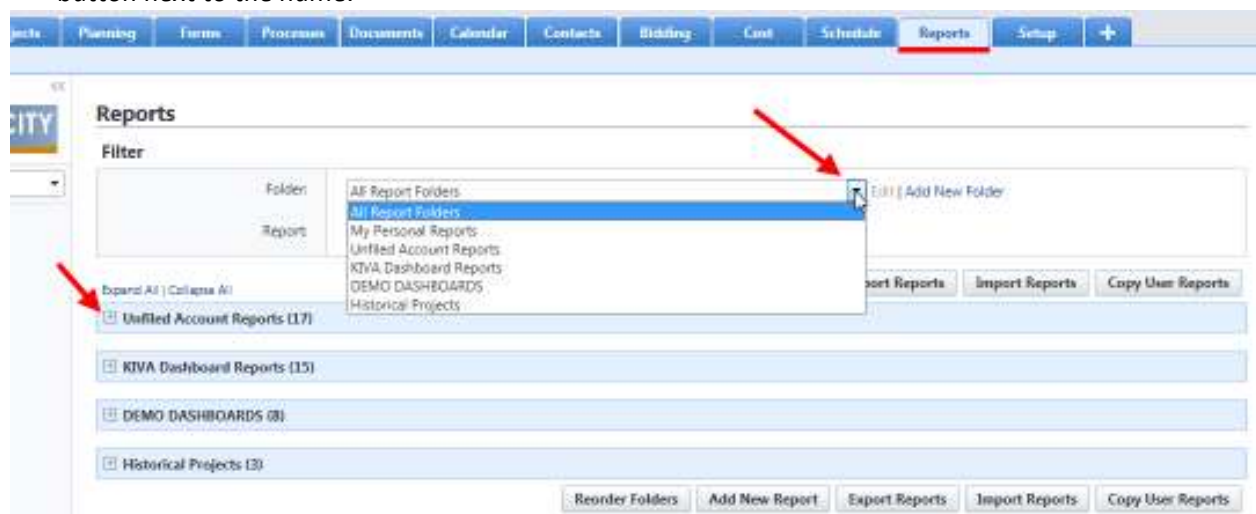




## Report Module

The e-Builder Reports module allows you to view reports on all aspects of your projects in e-Builder. Reports are lists, summaries, and analyses of your data, which you can display or print. The module enables any e-Builder user to easily report on real time, up-to-date information recorded in any of the e-Builder modules that users have access to.

1. Click on the **Reports** tab.
2. To view the contents of a single folder, click on the drop-down list in the middle of the screen and select the name of the desired folder. You can also access report folders by clicking the expand button next to the name.

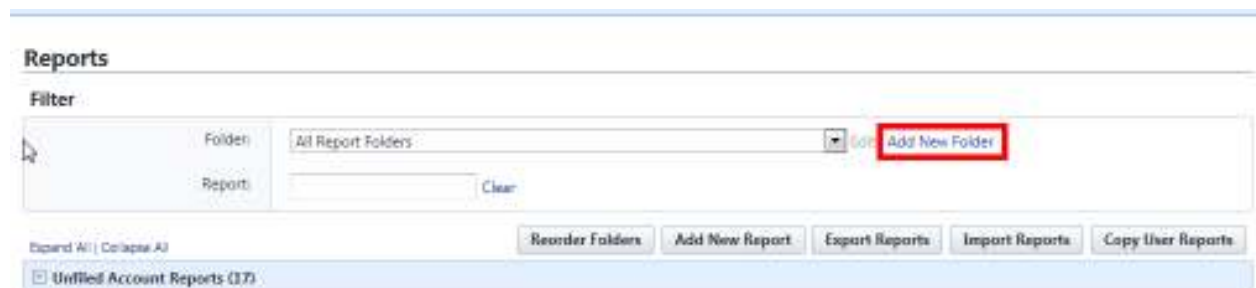


## Organizing your Reports

Each report saved is stored in a report folder, which is used to separate the reports into functional categories.

## Creating a Report Folder

3. From the Reports Tab, click the **Add New Folder** link.



4. Enter a name for the new report folder. Click **Save**.



## Add Report Folder

The 'Add Report Folder' dialog box has a 'Folder Name' field containing 'Dan's Performance Logs'. Below this, there are two panes. The left pane, titled 'Reports in This Folder', contains a list of reports: 'Unfiled Reports', '\*Project List - All Projects', '5th floor intake Log', 'CISI Document report without date', 'CISI Folders with documents', 'CISI Reports Public', 'CISI's Created Last week', 'Commercial Open Pre-Application Forms', and 'Documents Emailed into CR prol. Last 3 days'. The right pane, also titled 'Reports in This Folder', is currently empty. At the top right of the dialog are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box.

## Reordering Report Folders

To change the order in which are reports are displayed, Click **Reorder Folders**.

The 'Reports' section of the application shows a 'Filter' area with 'Folder' set to 'All Report Folders' and 'Report' set to an empty field. Below the filter are buttons for 'Expand All', 'Collapse All', 'Reorder Folders' (highlighted with a red box), 'Add New Report', 'Export Reports', 'Import Reports', and 'Copy User Reports'. A list of reports is shown below, with 'Unfiled Account Reports (17)' selected.

5. Click on the name of a report folder.
6. Click the Top, Up, Down, or Bottom button to change the order in which they are listed, if desired.

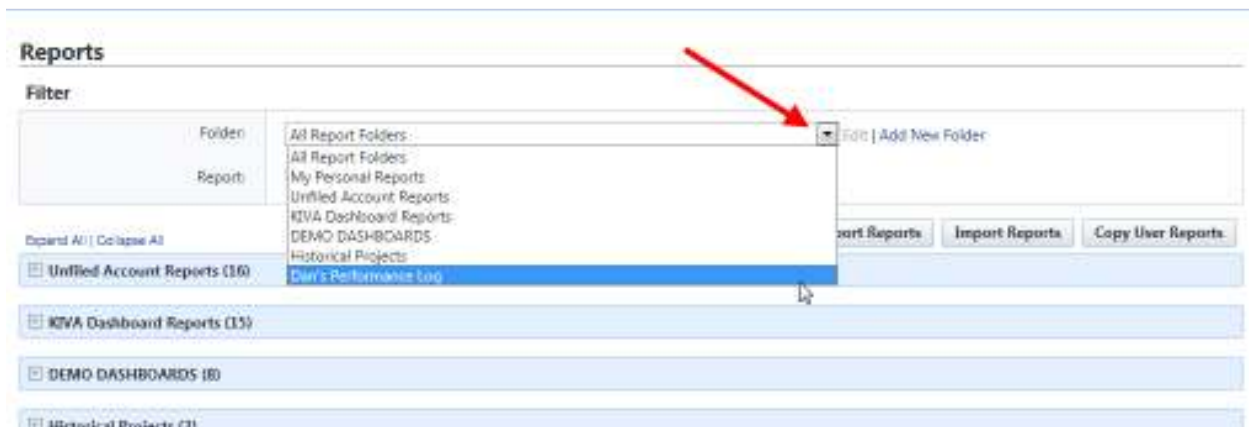
## Reorder Report Folders

The 'Reorder Report Folders' dialog box shows a list of folders: 'KIVA Dashboard Reports', 'DEMO DASHBOARDS' (highlighted with a blue bar and a red arrow), and 'Historical Projects'. To the right of the list are four buttons: 'Top', 'Up', 'Down', and 'Bottom'. A red arrow points to the 'Down' button. At the top right are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box. At the bottom right are 'Save' and 'Cancel' buttons.

7. When finished, click **Save**.

## Editing/Deleting a Folder

8. Select the folder name in the drop-down.



**Reports**

Filter

Folder: All Report Folders: Edit | Add New Folder

Report: All Report Folders, My Personal Reports, Unfiled Account Reports, KIVA Dashboard Reports, DEMO DASHBOARDS, Historical Projects

Unfiled Account Reports (16) **Dan's Performance Log**

KIVA Dashboard Reports (15)

DEMO DASHBOARDS (8)

Historical Projects (3)

Export Reports Import Reports Copy User Reports

9. Click the **Edit** link located to the right off the folder name. On the Edit Report Folder screen you can:



**Reports**

Filter

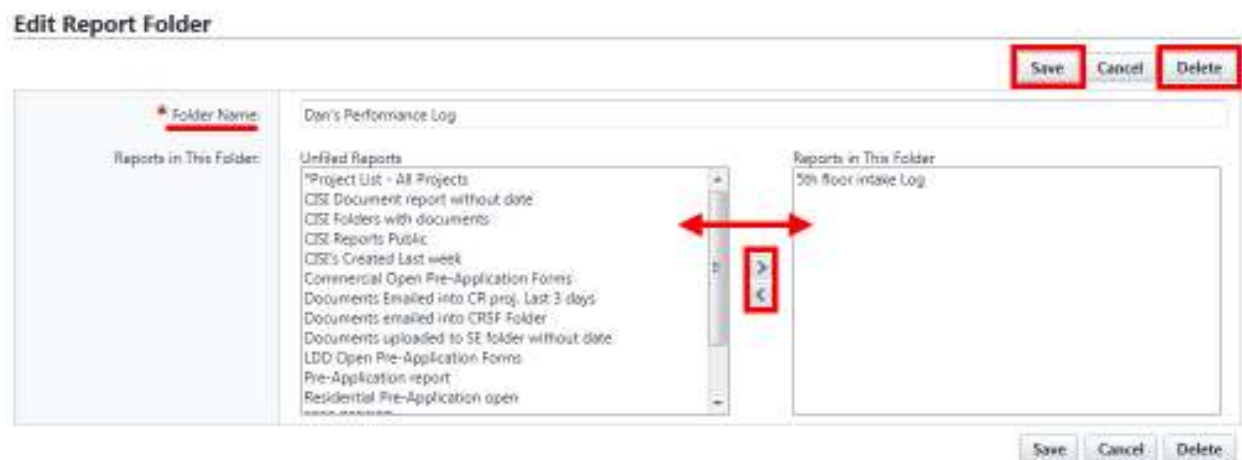
Folder: Dan's Performance Log Edit | Add New Folder

Report:  Clear

Add New Report Export Reports Import Reports Copy User Reports

Dan's Performance Log (1)

- Edit the Folder Name.
- Move Reports to or from the Unfiled Reports folder by choosing the report name and using the Add/Remove arrows
- Delete the Folder by clicking the delete tab. A confirmation dialog box will be displayed asking you to confirm your selection. Click **Yes, Delete the Report Folder** button.



**Edit Report Folder**

Folder Name: Dan's Performance Log Save Cancel Delete

Reports in This Folder:

Unfiled Reports

- \*Project List - All Projects
- CISE Document report without date
- CISE Folders with documents
- CISE Reports Public
- CISE's Created Last week
- Commercial Open Pre-Application Forms
- Documents Emailed into CR proj. Last 3 days
- Documents emailed into CRSF Folder
- Documents uploaded to SE folder without date
- LOD Open Pre-Application Forms
- Pre-Application report
- Residential Pre-Application open

Reports in This Folder

- 5th floor intake Log

Save Cancel Delete

10. Click **Save**.

## Creating a New Report

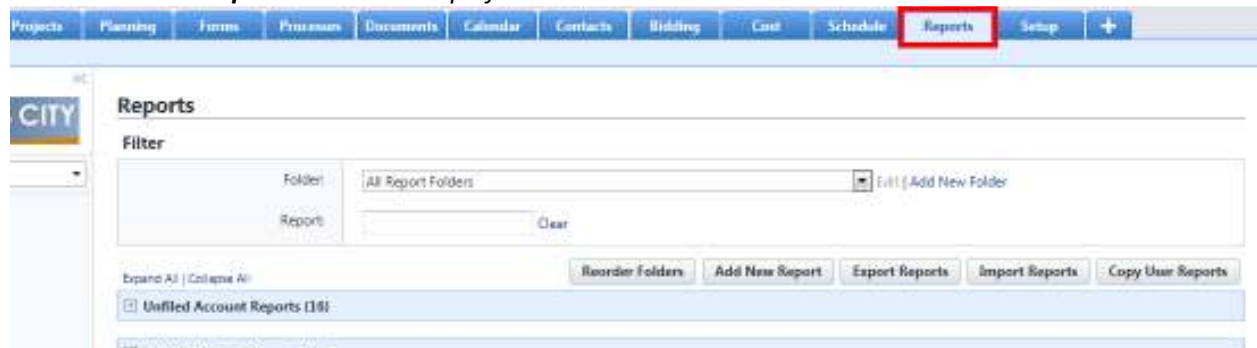
Users can create their own reports by using the Report Wizard, which is a series of screens that walks you through creating a customized report that displays only the information you need. As you complete



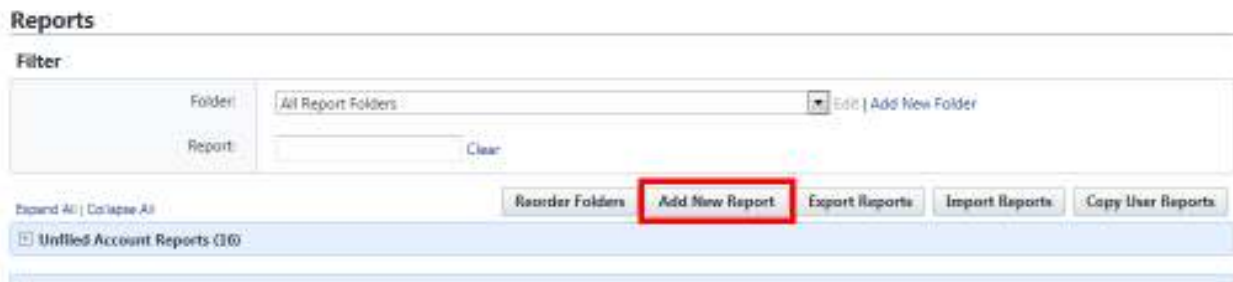
each step, click **Next**. You can click the **Previous** button to go back to the previous step or use the 'Jump to step' drop-down menu to skip steps. (Don't forget to use the Help (?) in the top right corner of the screen for any questions!)



11. Click on the **Reports** tab at the top of the screen.



12. Click on the **Add New Report** button. You will be directed to the Report wizard.



13. In Step 1, click the drop-down menu and select the type of data that will be used to run the report, click the **Next** button.



## Report Wizard

Step 1 of 7

Step 1: Select type of data for report and run as user

Jump to step: Select type of data for report

**Next** Cancel

Administrative Reports

**Administrative Reports**

Bidding Reports

Calendar Reports

Combined Reports

Contact Reports

Cost Reports

Documents Reports

Forms/Workflow Reports

Project Issues Reports

Process Reports

Schedule Reports

Submittals Reports

Run As User:

Lookup

Clear

Note: Populate Run As User field using Lookup to run the report in that user's context. Leave it blank to run the report in logged in user's context.

Run Report

Print View

Export

Save As

**Next** Cancel

First Name	Last Name	User Name	Company Name
Role Name: Admin			
Larry	Legal	Larry Legal	PDQ
Role Name: Construction Manager			
Al	Admin	Al Admin	Acme
Marty	Manager	Marty Manager	PDQ
Role Name: Contractor			
Carl	Contractor	Carl Contractor	CC Construction
Role Name: Inspector			
Carl	Consultant	Carl Consultant	CC Consulting

Report on the account roles for the users on the account.

14. In Step 2, click on the radio button for the type of report you wish to run. (Descriptions of each type are beneath the pictures) Click **Next**.

## Report Wizard

Step 2 of 7

Step 2: Select type of report

Jump to step: Select type of report

Previous **Next** Cancel

☐ Tabular Report

Tabular reports provide a simple listing of data, with no subtotals.

☒ Summary Report

Summary reports provide the option to sort and subtotal the data.

☐ Matrix Report

Matrix reports summarize data in a grid by grouping data in both rows and columns.

Run Report

Print View

Export

Save As

Previous

**Next**

Cancel

15. In Step 3, select the columns to be included in the report by placing a check mark next to the column name. Click **Next**.



## Report Wizard

Step 3 of 7

Jump to step: Select Columns

Step 3: Select columns to include in your report ☐ Return row for each multivalued field value

[Previous](#) [Next](#) [Cancel](#)

### Role Information

[Select All](#) | [Deselect All](#)

☐ Role Name ☐ Role Description

### User Information

[Select All](#) | [Deselect All](#)

<input type="checkbox"/> Account Expires	<input checked="" type="checkbox"/> Company Name	<input type="checkbox"/> Date added to role	<input type="checkbox"/> Email
<input type="checkbox"/> Email Format	<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Home Address	<input type="checkbox"/> Home City
<input type="checkbox"/> Home Country	<input type="checkbox"/> Home Fax	<input type="checkbox"/> Home Phone	<input type="checkbox"/> Home State
<input type="checkbox"/> Home Zip	<input type="checkbox"/> Job Title	<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> Office Address
<input type="checkbox"/> Office Cell	<input type="checkbox"/> Office City	<input type="checkbox"/> Office Country	<input type="checkbox"/> Office Fax
<input type="checkbox"/> Office Pager	<input type="checkbox"/> Office Phone	<input type="checkbox"/> Office PO Box	<input type="checkbox"/> Office State
<input type="checkbox"/> Office Zip	<input type="checkbox"/> Personal Cell	<input type="checkbox"/> Personal Pager	<input type="checkbox"/> Type of Business
<input type="checkbox"/> User Create Date	<input type="checkbox"/> User Department	<input type="checkbox"/> User Last Login	<input checked="" type="checkbox"/> User Name

### User Custom Fields

[Select All](#) | [Deselect All](#)

☐ Employee ID ☐ External User

### Formula Columns

[Add New Formula Column](#)

	Label	Formula
There are no formula columns.		

16. In Step 4, select the aggregate functions to be included in the report. Click **Next**.

## Report Wizard

Step 4 of 7

Jump to step: Select Aggregate Functions

Step 4: Select the information to summarize

[Previous](#) [Next](#) [Cancel](#)

### Standard Summary Fields

Columns	Sum	Average	Largest Value	Smallest Value	% Total	Match
Record Count	<input checked="" type="checkbox"/>					
First Name						<input type="checkbox"/>
Last Name						<input type="checkbox"/>
User Name						<input type="checkbox"/>
Company Name						<input type="checkbox"/>

[Run Report](#) [Print View](#) [Export](#) [Save As](#)

[Previous](#) [Next](#) [Cancel](#)

17. In Step 5, choose the ordering of the columns by using the Top, Up, Down, and Bottom buttons.



## Report Wizard

Step 5 of 7

Jump to step: Configure Columns

### Step 5: Configure Columns

Previous **Next** Cancel

Column Order	Sort Order
First Name	First Name <input checked="" type="radio"/> Ascending <input type="radio"/> Descending
Last Name	<input type="radio"/> Ascending <input type="radio"/> Descending
User Name	<input type="radio"/> Ascending <input type="radio"/> Descending
Company Name	<input type="radio"/> Ascending <input type="radio"/> Descending

### Set Column Widths

First Name	Last Name	User Name	Company Name

### Set Column Highlights

Highlighting is only available when integer, decimal, or currency fields are selected.

Logo

18. If you have chosen a summary or matrix report, select grouping in Step 6 (optional) and click **Next**.

## Report Wizard

Step 6 of 7

Jump to step: Select Grouping

### Step 6: Select columns to group your report by

Previous **Next** Cancel

#### Select Row Grouping:

Summarize Information By:	Sort Order:	Group Dates by:
Employee ID	Ascending	Day
and then By:	Sort Order:	Group Dates by:
	Ascending	Day

Run Report Print View Export Save As Previous **Next** Cancel

19. In Step 7, specify filter criteria for the report.





**Report Wizard** Step 7 of 7

Standard Date Filter Jump to step: Specify Filter

Columns: Account Expires  
Duration: Custom  
Dates: Start Date:  End Date:  Clear

**Step 7: Specify filter criteria for this report** Previous Cancel

☒ Show Report Details

Search Rule #1: Company Name equals e-Builder and  
Search Rule #2: and  
Search Rule #3: and  
Search Rule #4: and  
Search Rule #5: and

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 nesting or search terms, "1" equals yes or on, and "0" equals no or off.

**Run Report** Print View Export **Save** Save As Previous Cancel

20. Click **Save As** and enter a name and description for your report.

21. Click **Save**.

## Exporting a Report

22. Click on the **Reports** tab at the top of the screen.

Projects Planning Forms Processors Documents Calendar Contacts Bidding Cost Schedule **Reports** Setup +

**Reports**

Filter

Folder: All Report Folders

Report:

Expand All | Collapse All

☒ Unfiled Account Reports (18)

23. Expand folder to display desired reports and click **Export** to the right of report.





## Reports

Filter

Folder: All Report Folders [v] Edit | Add New Folder

Report: [ ] Clear

Expand All | Collapse All

Reorder Folders Add New Report Export Reports Import Reports Copy User Reports

☒ Unified Account Reports (18)

edit   delete   export	*Project List - All Projects
edit   delete   export	CISI Document report without date - Run this to show all documents submitted in CISI folders then reduce by upload date.
edit   delete   export	CISI Folders with documents - Run this to find all CISI with folders in ebuilder
edit   delete   <b>export</b>	CISI Reports Public - Public report for CISI documents submitted
edit   delete   export	CISI's Created Last week - Lists all PERM records with a CISI permit type created in last week.
edit   delete   export	Commercial Open Pre-Application Forms - This shows open Pre-Application forms for Commercial
edit   delete   export	Documents Emailed into CR proj. Last 3 days - Documents Emailed into CR proj. Last 3 days

24. Choose the type of file to export the report as and click **Export**.

edit | delete | export CISI Folders with documents - Run this to find all CISI with folders in ebuilder

edit | delete | export CISI Reports Public - Public report for CISI documents submitted

edit | delete | export CISI's Created Last week - Lists all PERM records with a CISI permit type created in last week.

edit | delete | export Commercial Open Pre-Application Forms - This shows open Pre-Application forms for Commercial

edit | delete | export Documents Emailed into CR proj. Last 3 days - Documents Emailed into CR proj. Last 3 days

edit | delete | export Documents emailed into CRSF Folder - This picks up all Residential Submittals

edit | delete | export Documents uploaded to SE folder without date - Input date or range to run this report

edit | delete | export LDD Open Pre-Application Forms - This only shows LDD pre-application forms

edit | delete | export Pre-Application report - This tells you if there are any open pre-applications

edit | delete | export Residential Pre-Application open - Shows open residential Pre-application forms.

edit | delete | export SE20 REPORT - SE20 SUBMITTALS

Select Output Type

☒ Excel Data Export

☐ CSV Data Export

☐ Tab Delimited Text

Export Cancel

25. Select **Open** to view in Excel or **Save** to save the file onto your computer.

Do you want to open or save CISI Reports Public - 201307171605.xls (5.00 KB) from app.e-builder.net?

Open Save Cancel

## Editing an Existing Report

26. Click on the **Reports** tab at the top of the screen.

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

CITY

### Reports

Filter

Folder: All Report Folders [v] Edit | Add New Folder

Report: [ ] Clear

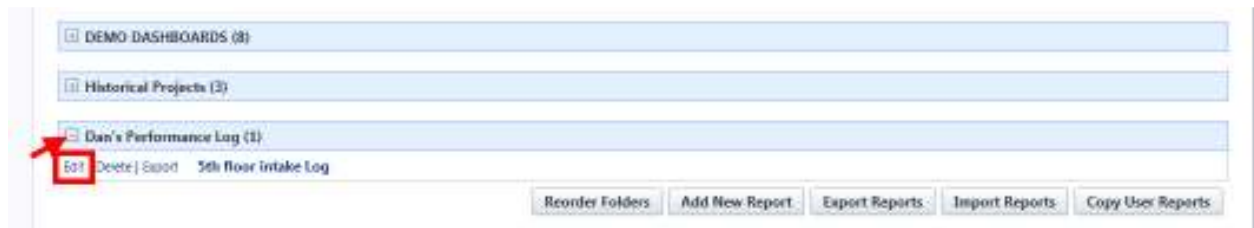
Expand All | Collapse All

Reorder Folders Add New Report Export Reports Import Reports Copy User Reports

☒ Unified Account Reports (18)



27. Click on **Edit** next to the name of the report.



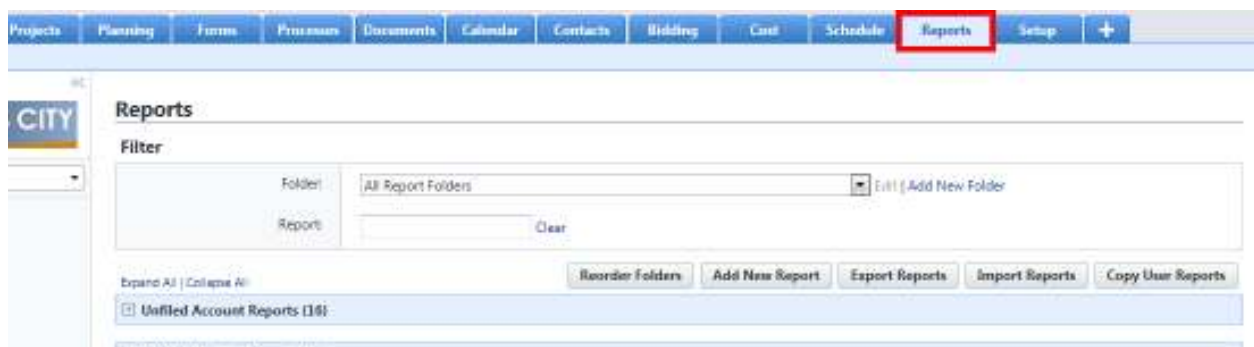
28. Modify any aspect of the report within the Report Wizard. (See Creating a New Report, above, for more information if necessary)

29. Click the **Save** or **Save As** (to rename) button .



## Running Reports

30. Click on the **reports** tab at the top of the screen.



31. Click on the name of the report that you wish to run. The results of the report will be displayed on the screen.

Expand All | Collapse All

Reorder Folders Add New Report Export Reports Import Reports Copy User Reports

Unified Account Reports (16)

KVA Dashboard Reports (15)

DEMO DASHBOARDS (8)

Historical Projects (3)

Dan's Performance Log (1)

Edit | Delete | Export

5th floor Intake Log

Reorder Folders Add New Report Export Reports Import Reports Copy User Reports

### 5th floor intake Log

Hide Details Print View Send Export Edit Save Save As



Filter By:

Parent Folder Name equals LDD Plan Intake Log, Commercial Plan Intake Log

Date Uploaded is Yesterday

Parent Folder Name	Date Uploaded	File Name	File Description	Uploaded By	Company	File Size
Commercial Plan Intake Log (6 records)						
Date Uploaded: 07.16.2013 (6 records)						
Commercial Plan Intake Log	07.16.2013	201410116 -- Xpress Mart -- 2001 Swope Parkway -- 07-16-2013 at 09.36.06.msg	Submitted By Sarah Simmons (Sarah.Simmons@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	5d1334d -- Highlands of northview 4th plot -- na -- 07-16-2013 at 12.16.43.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.1KB
Commercial Plan Intake Log	07.16.2013	na -- 4326 roanoke -- roanoke condo -- 07-16-2013 at 12.48.40.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	201311022 -- Bank Liberty -- 9200 NW Barry Rd -- 07-16-2013 at 14.36.44.msg	Submitted By Sarah Simmons (Sarah.Simmons@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	201210030 -- park reserve yellowstone condo -- 30th baltimore -- 07-16-2013 at 15.03.16.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	201311167 -- alta vista charter high school -- 2640 belleview -- 07-16-2013 at 15.04.17.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.0KB
LDD Plan Intake Log (2 records)						
Date Uploaded: 07.16.2013 (2 records)						
LDD Plan Intake Log	07.16.2013	NA -- Dollar General -- 85th & Holmes -- 07-16-2013 at 11.08.40.msg	Submitted By Sarah Simmons (Sarah.Simmons@kcmo.org)	In, Emailed	N/A	4.9KB
LDD Plan Intake Log	07.16.2013	na -- panvin road 1st -- na -- 07-16-2013 at 12.13.24.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	4.9KB
Grand Totals (8 records)						

Hide Details Print View Send Export Edit Save Save As



## Dashboard Module

Dashboards are graphical representation of reports that present summary data in a visual format. They are typically used to provide overviews of program or project status and metrics. Dashboards are dependent on the information contained within the reports.

### Creating a Dashboard

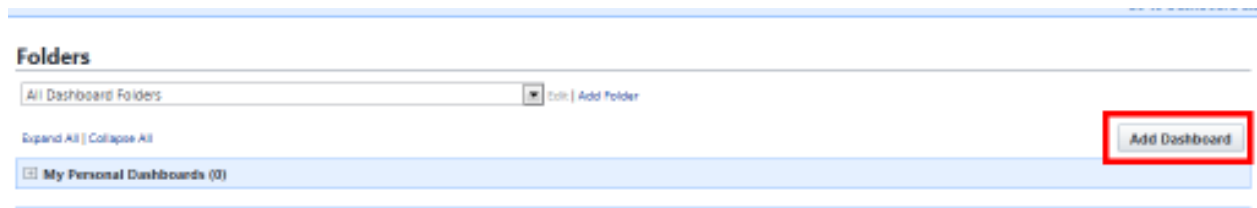
32. Click the **Dashboard** tab at the top of the page.



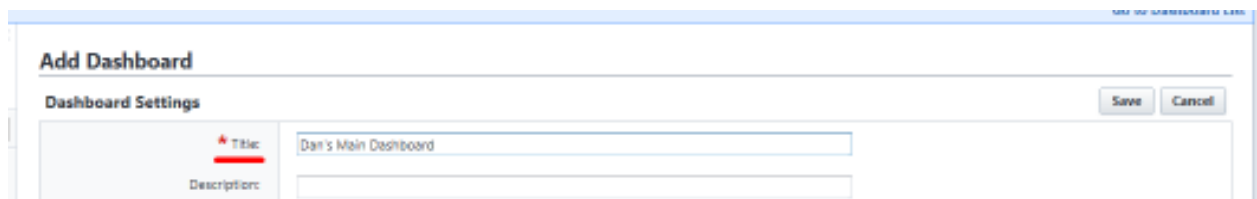
33. Select the **Go To Dashboard List** link, to the right of View Dashboard.



34. Click the **Add Dashboard** button.



35. Type a Title for the dashboard.



36. Select the Layout Style: Two or Three columns. Select column width: Narrow, Medium, Wide, or Custom.



**\* Dashboard Layout Style:**

☐ Two Columns ☒ Three Columns

**\* Size of Column 1:** Medium

**\* Size of Column 2:** Medium

**\* Size of Column 3:** Narrow

37. Select the folder to store the dashboard in.

**\* Folder:**

My Personal Dashboards

My Personal Dashboards

38. Click the **Save** button.

Save Cancel

Dan's Main Dashboard

## Dashboard Items

Once you have created your Dashboard, you have to add items to it. Dashboard items are the individual graphs that summarize the data.

To add a dashboard item:

39. Select the name of the Dashboard.

Dashboard Projects Planning Forms Processes Documents Calendar Contacts Billing Cost Schedule Reports +

Go to Dashboard List

KANSAS CITY

Recent Pages...

Folders

All Dashboard Folders

Expand All Collapse All

My Personal Dashboards (1)

Edit Delete Dan's Main Dashboard

Untitled Account Dashboards (1)

City Planning Department Dashboards (2)

Add Dashboard

40. Click the **Edit** link or the **Click here to configure this dashboard** link.



## Dashboard

Dan's Main Dashboard Edit

There are **0** dashboard items to display on this dashboard  
[Click Here to configure this dashboard](#)

41. Click the **Add Dashboard Item** for the column in which the dashboard should be displayed.

Dan's Main Dashboard

[Add Dashboard Item](#) [Add Dashboard Item](#) [Add Dashboard Item](#)

e-Builder Community | About | Help

42. Select a Component Type: Chart, Table, Metric, Gauge.

### Dashboard Item Settings

Dashboard:	Dan's Main Dashboard
* Component Type:	<div><input checked="" type="radio"/> Chart <input type="radio"/> Table <input type="radio"/> Metric <input type="radio"/> Gauge</div>

43. For Chart:

- Select Report, Chart Type, and Sort By (Other fields are optional)
- Click **Save**

Header:

Facility:

Title:

\* Custom Report:

\* Select Project:

\* Chart Type:

\* Sort By:

\* Select Aggregate(s):

Y-Axis Label:  (30 char max)

Maximum Items Displayed:

Note: Selected aggregates must be the same function type. (e.g. only sums or only averages)

Note: The Y Axis label is required only if multiple aggregates are selected.

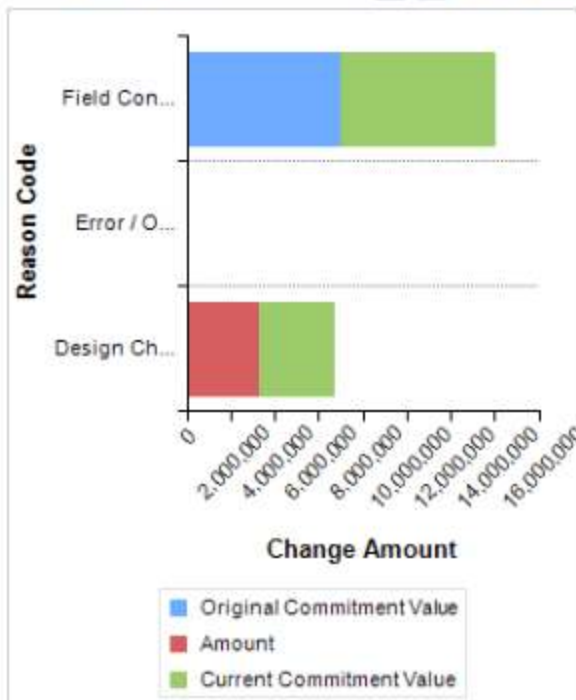
**Selected Aggregates**

- Sum of Original Commitment Value
- Sum of Amount
- Sum of Current Commitment Value

**Save** **Cancel**

## Change Orders

▼ ⏪ Edit | Delete



9th Street Parking Garage

### 44. For Table

- Select Report and Sort By
- Click Save





Header:	<input type="text" value="Project Accesses"/>
Footer:	<input type="text"/>
* Custom Report:	<input type="text" value="Dashboards - Project Accesses"/>
* Sort By:	<input type="text" value="Row Label Ascending"/>

### Project Accesses

[Edit](#) | [Delete](#)

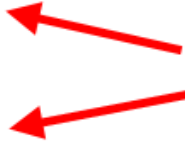
Project Name	Sum of Project Accesses
Adams University Classroom Renovation	177.00
Anderson School Building Renovations	100.00
APWA Renovation	25.00
Baptist Hospital Cath Lab Remodel	122.00
Beamont Waterway	81.00
Boulder Baptist Hospital	89.00
Brandon Park, Downtown Denver	57.00
Campbell Cancer Research	265.00
Central Plant Roof Replacement	47.00
Clarke Testing Center	16.00
Claude Moore	173.00

45. For Metric:

- Select Report, Sort By, Range Numbers & Colors
- Click **Save**



Header:	Total User Logins
Footer:	Last 30 Days
* Custom Report:	Dashboards - User Adoption Report # of Logins
* Sort By:	Row Value Descending
Maximum Items Displayed:	15
Low Range Color:	<div></div>
Low - Mid Cutoff Value:	9
Middle Range Color:	<div></div>
High Threshold Value:	15
High Range Color:	<div></div>



### Total User Logins

[Edit](#) | [Delete](#)

Last Name	Sum of Number of Logins
Owen	211.00
Valle	125.00
Whitmore	108.00
Eberly	60.00
Service	24.00
Procaccini	22.00
Kelley	10.00
Aranda	8.00
McCarthy	3.00
Dwyer	2.00
Nanninga	2.00
Fecteau	1.00
Godsey	1.00
Matovu	1.00
Admin	0.00

Last 30 Days

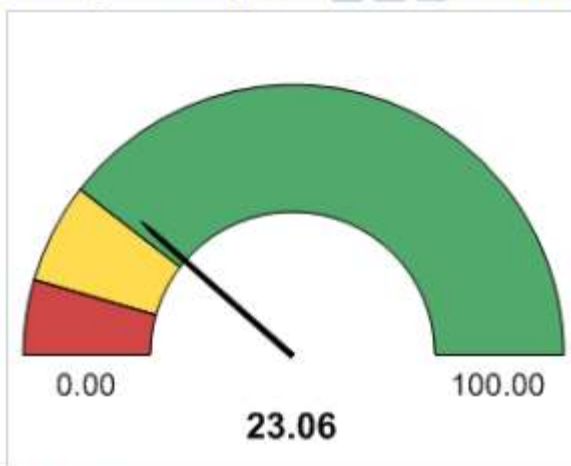
#### 46. For Gauge:

- Select Report, Range Colors, and Cutoff Values
- Click **Save**

Footer:	<input type="text" value="Last 30 Days"/>
Title:	<input type="text"/>
* Custom Report:	<input type="text" value="Dashboards - Avg User Logins"/>
Minimum Value:	<input type="text"/>
Maximum Value:	<input type="text" value="100"/>
Low Range Color:	<input type="color" value="#C00000"/>
Low - Mid Cutoff Value:	<input type="text" value="9"/>
Middle Range Color:	<input type="color" value="#FFD700"/>
High Threshold Value:	<input type="text" value="21"/>
High Range Color:	<input type="color" value="#008000"/>



**Average User Logins**    [Edit](#) | [Delete](#)



Last 30 Days

Note: Dashboards are based on summary and matrix reports. The values are determined by groupings.