e-Builder Online User Assistance

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1 e-Builder Online User Assistance

1.1 Reports

1.1.1 What is the e-Builder Reports 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. It enables any e-Builder user to easily report on real time up-to-date information recorded in any of the e-Builder modules that they have access to.

The integrated nature of the cost, schedule, documents, and forms modules provides you with a flexible and efficient way to define and generate a broad range of reports with a few mouse clicks. Matrix reports can be configured to include a broad range of metrics, including: cash flow analysis, project status information, schedule variance, and more. Each report contains links to line items for drill-down capabilities into greater detail.

Without an on-line system, typically reports or logs require manual manipulation or compilation, especially if having to generate cross project reporting. With e-Builder all of that work is eliminated. RFI logs, Budget Reports, and Document Logs are just a few examples of the types of reports that can be created in the Reports module. You can define standard reports for use across your organization, and also have the capability for individual team members to define custom reports.

In summary, the reports module streamlines the reporting process for all users while reducing the effort, time and cost associated with the typical manual process. The added control over cost, schedule, and scope will allow team members to spend less time managing data and more time proactively managing projects. The sections below detail the creation and usage of the Reports module.
1.1.2 Key Concepts - Reports Module

E-Builder is an integrated project management and collaboration system for the construction industry. The e-Builder reports module is ideal for all users to report on information entered in all of the other modules. Before you start using the e-Builder reports module help you should familiarize yourself with some key concepts used throughout this section, and with the modules that you will be reporting on.

**Project**

Most everything in e-Builder takes place within the context of a project. Projects in e-Builder refer to the various projects that you are participating in. Each 'real world' project is associated with a project in e-Builder. If you are working on the 'real world' project, then you can be added as a member of the project in e-Builder. Your e-Builder or Project Administrator will be able to add you as a member of a project in e-Builder.

**Report**

Reports are lists, summaries, and analyses of your data, which you can display or print.

**Report Folder**

Each report that is saved is stored in a report folder. The report folders are used to separate the reports into functional categories. Report folders are created by the e-Builder administrator.
1.1.3 Typical Job Functions Using this Module

e-Builder supports the different team members that are involved in the project. All users will be able to report on the Projects that they have access to. The information that is displayed in the report is limited based on the users’ permissions in each of the other modules in e-Builder.

All team members can and will take advantage of the reports module.

Executive

As an executive, you will use the e-Builder reports module to stay on top of the progress associated with all of your projects or your program. You will easily monitor your status on multiple projects. You will also review historical statistics and past project performance to determine what you should do on future projects. You can also standardize the information you will measure, such as key performance indicators and/or milestones, to ensure you are looking at critical information in a consistent manner across your program. No need to log in to e-Builder either; using the report subscription function you will receive program-level reports directly in your email inbox at certain predefined times.

Project Manager
As the project manager, you will use the e-Builder reports module to summarize or aggregate your critical project information to quickly address issues before they become timely or costly. That means you will have complete control and access to the critical project information from start to finish.

You will manage by exception so you can instantly see when something slips. You can also drill into the detail as needed right from the report. You will use the reporting engine to analyze project performance. You will also be able to quickly identify and prevent bottlenecks, summarize projections and use this information to make informed decisions.

If you have many team members executing your plan you will access your resource reports that will help you gain an understanding on the tasks you are managing that are not complete, tasks that are slipping, or even tasks that are starting soon. Or, for example, during construction, you might want to generate an RFI, meeting minutes, or submittal log report to see which items are open, what are the latest comments, and who's court they are in.

The bottom line is that you will spend less time mining or managing the data. The e-Builder reports module will do that for you. You can then spend time where it's needed - managing the project to ensure it completes on time and within scope and budget.

**Project Participant**

As a team member, you will use the e-Builder reports module to quickly gain access to your work reports. You will need to know which tasks are starting soon, which are in progress, which are running late, and so forth. You may need to access a meeting minutes report that detail out the items that you are responsible to complete. Maybe you need to reconcile the invoice or commitment data you entered in the cost module within a project. Or, need to access a few key documents from a set of folders you are responsible to manage.

No matter the work responsibility, the reports module can allow you to easily create and manage reports that are important specifically for you so that at the end of the day you are spending less time trying to find project information and more time on getting the work done.
1.1.4 Controls

1.1.4.1 Accessing the Reports Module

The e-Builder reports module can be accessed by clicking on the Reports tab at the top of the screen.

The Reports tab takes you into the e-Builder reports module. Once there you will see a list of folders and report names. 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 that folder. By default, the drop down list will display All Report Folders. You can also access other report folders by scrolling down the screen.
Note: Not all users may see the same reports in each folder. e-Builder administrators can assign reports to specific user groups.
1.1.4.2 Adding New Folders

To add a new report folder click on the Add New Folder link.

⚠️ **Note:** Only e-Builder Administrators will be able to Add Report Folders.

In the Add Report Folder Screen enter the name of the new Report Folder. You can also move any saved reports from the Unfiled Reports folder into this new folder. To add the reports click on the name of the report and press the Add button. When finished press the Save button to create the new folder. To cancel the process press the Cancel button.
1.1.4.3 Reorder Folders

To change the order of the Report Folders press the Reorder Folders button.

⚠️ Note: Only an e-Builder Administrator will be able to reorder the report folders.

In the Reorder Report Folders screen click on the name of a report folder and press the Top, Up, Down, or Bottom button to change the order they are listed in. Top moves the folder to the top of the list, Bottom makes it the last report in the list, and Up or Down moves the folder up or down one place from its current order.

When finished press the Save button to save your changes. To cancel the process press the Cancel button.
1.4.4 Editing Report Folders

To edit a report folder or its contents select its name from the Reports folder drop down list.

⚠️ Note: Only e-Builder Administrators will be able to Edit Report Folders.

In the Edit Report Folder screen you can edit the name of the folder, remove or add reports, or delete it. To change the name of the folder enter its new name in the Folder Name field and press the Save button.

To add reports from the Unfiled Reports folder click on the name of the report and press the Add button. To remove reports from this folder and move them into the Unfiled Reports folder click on the name of the report and press the Remove button. When finished press the Save button.

To delete a Report Folder press the Delete button. After you press the Delete button you will be asked to confirm your selection. Press the Yes, Delete the Report Folder button to proceed.

Note: Any Reports saved in a deleted folder will automatically be moved into the Unfiled Reports folder.
1.1.5 Running a Report

To run an existing report in e-Builder click on its name. The results of the report will then be displayed on the screen.
1.1.5.1 Exporting a Report

From the main reports screen you can export the results of a report from e-Builder into MS Excel. To do this click on the Export link next to the name of the report.

A file download window will then open that will prompt you to Open or Save the export file. Press the Open button to open the file, or Save to save the file on your computer.

⚠️ Note: The exported file will not include any row groupings, column groupings, or totals. It only includes the data from the report.
1.1.5.2 Email a Report

After running a report you can choose to have this report emailed. To do this Click on the Send button.

The Send Report screen will pop-up. You can choose to enter an email address or you can Click on the Lookup button and select a user or contact within e-Builder. Once you have entered your Subject and an optional message you can Click the Send button.

‼️ Note: There is a limit of 500 rows (users emailed to), for system speed and efficiency.

‼️ Note: The emailed file will not include any row groupings, column groupings, or totals. It only includes the data from the report. It will be sent as a MS Excel file.
All e-Builder users can create their own custom reports. To begin the process press the Add New Report button from the main screen of the reports tab. You are then directed into the Report Wizard.

After you press the Add New Report button you are directed to the Report Wizard. Following the steps in the Report Wizard will help you to create customized reports that display the information you need. As you complete each step in the step-by-step wizard you will press the next button. Once you proceed past step 1 you can press the previous button to go back to the previous step.
1.1.6.1.1 Jump to Step-Reports

At any time in the process of creating a report you have the option to skip or "jump" to an upcoming or previous step in the Report Wizard. To do this select the name of the step from the drop down list next to the phrase "Jump to step".
The Print View button performs a similar function to the Export button in that it also sends the results of your report into MS Excel. The difference is that the Print View is a snapshot of the screen and so it will maintain any groupings and totals that are on your report.
1.1.6.1.3 Export-Reports

The Export button on the Report Wizard screen executes the same action as the Export link listed next to the name of any saved report. For more details on this function please refer to exporting a report.
1.1.6.1.4 Save As-Reports

The Save As button allows you to save a report in e-Builder. When you have fully configured your report to present the data that is required in the correct format, press the Save As button to save the report for future use.

On the Save Report (As) screen you will be directed to enter a name for the report. You are also have the option of entering a description in the Report Description field. In the Report Permissions If you select to make the report available to all users or to specified roles then the Report Folder drop down list will become active and allow you to select the folder that the report is to be saved in. If the, This report is available only to me, option is selected the report folder field is inactive and the report will be saved in your Personal Reports folder. When saving the report for specific roles add roles by selecting the name of the role(s) and pressing the Add button.

To complete the process press the Save or Save and Run Report button. Both options will save the report. The Save and Run Report button will also display the results of your report on the screen.
1.1.6.1.5 Run Report

From the Report Wizard screen you can view the results of your report at any time. This is useful in setting up any new report as it will allow you to verify that it meets your needs. Press the Run Report button to see the information.

To return back to the Report Wizard to make further changes to your report press the Edit Button. This will return you to Step 1 of the Report Wizard, but will not change any of the selections you made in your report configuration.
1.1.6.2 Select Type of Data for Report and Run As User

In Step 1 of the Report Wizard you can select the type of data to report on. To make a selection click on the drop down list underneath the phrase Step 1: Select type of data for report. You will then see a list of options, which will vary based on the modules in use on your account.

Select the type of data and press next to proceed to Step 2 in the Report Wizard.

e-Builder Administrators will also be able to set a report to display the results that a specific user has permission to see (see image below). To do so press the lookup button and a new window will open which will allow you to select a user's name.
The Schedule reports option enables you to report on data in the Schedule module of e-Builder.

The types of schedule reports that can be run are as follows:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedules and Tasks</td>
<td>Report on overall Schedule and on Individual tasks that compose the schedule for one or more projects. For example, a report showing all tasks on a project that are scheduled to finish 5 days or more behind schedule.</td>
</tr>
<tr>
<td>Schedules</td>
<td>Report on overall Schedule and Master Tasks in the schedule for one or more projects. For example, a report listing the start and finish date and each of the key Master Tasks included in the schedule for one or more projects.</td>
</tr>
</tbody>
</table>

⚠️ Note: Master Tasks are critical dates or milestones that are common across more than one project. To enable true program level reporting that meets the needs of an executive, e-Builder requires tasks to be flagged program-wide. The
Administration section will cover how to configure master tasks in e-Builder.
A project's Gantt Chart can be printed from within the Reports Module.

The type of schedule report that can generate a Gantt Chart is the: Schedules and Tasks report type.

After you build the report Press the Run Report button. You will now be able to graphically view your schedule by clicking on the Gantt Chart button.

You will now be able to adjust the Paper Size and Page Layout of the print out. Add columns and order the tasks. Clicking the Refresh button will update the Chart with any adjustments that you have made. The Print button will send the chart to your local printer.
The Contact reports option enables you to report on data in the Contacts module of e-Builder.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Companies</td>
<td>Report on the Companies listed in your contacts database. For example, a list of your vendors that qualify as diversity suppliers.</td>
</tr>
<tr>
<td>Contacts</td>
<td>Report on the Contacts stored in your contacts database. For example, a list of all of your primary contacts with each of your vendors.</td>
</tr>
</tbody>
</table>
The Cost reports option enables you to report on data in the Cost module of e-Builder. The cost module allows the widest variety of report types.

The types of cost reports that can be run are as follows:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Cost Summary</td>
<td>Report on Budget Cost Summary data for one or more projects. For example, a report showing the Total Budget, Commitments, and Actual Costs on each project in a capital program.</td>
</tr>
<tr>
<td>Budget Line Item</td>
<td>Report on Cost information for each line item in the budget. For example, report on how much money is left to spend on Construction on all 5 of your active projects.</td>
</tr>
<tr>
<td>Budget Changes</td>
<td>Report on the changes to a budget. For example, a Project Manager can see a list of all of their budget changes and the reason why each change was made.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Budget Change Items</td>
<td>Report on budget changes for each line item in the budget. For example, a list of the budget changes for each line item in the budget on all new construction projects.</td>
</tr>
<tr>
<td>Budget Planning Summary</td>
<td>Report on budgets while they are in the draft status. For example, a list of projects with budgets in draft status that have been submitted for approval.</td>
</tr>
<tr>
<td>Budget Planning By Line Item</td>
<td>Report on budgets at the line item detail level while they are in the draft status. For example, a Project Manager can report on how much he has budgeted for design fees on each of his projects before he approves the budgets.</td>
</tr>
<tr>
<td>Commitments</td>
<td>Report on commitments for one or more projects. For example, prior to negotiating a new contract with a vendor, run a report on how much is committed with that vendor on all projects.</td>
</tr>
<tr>
<td>Commitment Items</td>
<td>Report on the details of commitment items. For example, report on the breakdown by budget line item of all contracts with the General Contractor or Architect on a project.</td>
</tr>
<tr>
<td>Commitment Changes</td>
<td>Report on any changes to commitments. For example, a Project Manager can report on all pending commitment changes to see what the impact would be if each of the associated change orders were approved.</td>
</tr>
<tr>
<td>Commitment Change Items</td>
<td>Report on the changes to commitments at the commitment item level. For example, a detailed list of the impact on each commitment item of the change orders on a project.</td>
</tr>
<tr>
<td>Actual Costs</td>
<td>Report on the invoices for one or more projects. For example, a report of the invoices approved by month during the course of a project.</td>
</tr>
<tr>
<td>Actual Cost Items</td>
<td>Report on the details invoice items. For example, a report showing the contracts on a project and the detailed breakdown of how much has been paid on each one.</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Items Pending Approval</td>
<td>Report on the draft items that are awaiting approval. For example, a list of all of the commitments that need to be approved by the Project Manager.</td>
</tr>
<tr>
<td>Funding Sources</td>
<td>Report on the status of the funding sources for one or more projects. For example, show how much has been used from each funding source and what the remaining balance is.</td>
</tr>
<tr>
<td>Funding Source Transactions</td>
<td>Report on the individual transactions involving the funding sources. For example, a report showing all of the transactions on the funding source.</td>
</tr>
<tr>
<td>Budget Funding</td>
<td>Report on the funding source allocations assigned to each budget line item. For example, a matrix report showing all the funding sources and their budget line item allocation amounts, grouped by account code and description.</td>
</tr>
<tr>
<td>Commitment Funding</td>
<td>Report on the funding source allocations assigned to each commitment line item. For example, a matrix report showing all the funding sources and their commitment line item allocation amounts, grouped by account code and description.</td>
</tr>
<tr>
<td>Actual Cost Funding</td>
<td>Report on the funding source allocations assigned to each invoice line item. For example, a matrix report showing all the funding sources and their invoice line item allocation amounts, grouped by account code and description.</td>
</tr>
</tbody>
</table>
Cash Flow Report on the expected cash outflows in previous or future months for one or more projects. For example, a Program Manager can report on the expected cash flow in the coming 12 months in order to plan when to borrow the necessary funds.

Cash Flow Details Report at the budget line item level on expected cash outflows. For example, a report that shows how much money is expected to be spent in 6 months on both design and construction.

**Tip:** There is overlap in the reporting options on many of the report types. Because of this you may be able to use more than one type of cost report to provide you with the data that you need.

**Note:** In the e-builder database, all the currency values are stored up to four decimal places but only two are viewable on the Cost View, which may lead to rounding differences. This means that if you filter on an exact decimal amount looking at data via the Cost View, you may not get the correct results.
The Bidding reports option enables you to report on data in the Bidding module of e-Builder. If your account is not using set up to use the Bidding module, you will not see it listed as an option.

The types of bidding reports that can be run are as follows:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Bidding Summary</td>
<td>A high-level overview of the status of the bids on your projects. For example, you could print a summary report showing the numbers of invited bidders, their respective statuses, and responses for each of your projects.</td>
</tr>
<tr>
<td>Bidders</td>
<td>Report on the companies or contacts that have either submitted or just been invited to bid. For example, you could run a report of all companies, their contact information, a summary column showing the details of their bidding, and other pertinent information.</td>
</tr>
<tr>
<td>Bid Coverage</td>
<td>Report on your bid coverage for a project, listed by construction code. For example, you could run a report that shows how many bidders were invited and how many accepted the invitation to bid for MEP work. If you configured color coding for each of your columns in the invited bidder details for the project bid, it will also carry forward and be shown in the report output.</td>
</tr>
</tbody>
</table>
The Document reports option enables you to report on data in the Documents module of e-Builder.

The types of document reports that can be run are as follows:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Usage</td>
<td>Report on the number of files and folders being used on a project (or for multiple projects) and the amount data being stored. For example, a Project Manager might run this report to review how many documents have been stored for a given project.</td>
</tr>
<tr>
<td>Document Log</td>
<td>Report on individual files that are uploaded into the documents area of any project. For example, a list of all files added to the Schematic Design folder during the week that they were due for submission.</td>
</tr>
<tr>
<td>Progress Photo</td>
<td>Report on progress photos and display thumbnail images of the photos. For example, a report showing Aerials uploaded in the past 2 weeks.</td>
</tr>
<tr>
<td>Progress Photo Image</td>
<td>Display images of the photos stored in a progress photos folder. This report would be used to see larger sized images of a specified set of progress photos. For example, to complete a close out package for a project the Project Manager may want to run a full Progress Photo report of all documented images from start to finish.</td>
</tr>
</tbody>
</table>
The Calendar reports option enables you to report on meetings and events recorded in the calendar module of e-Builder.

The types of calendar reports that can be run are as follows:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events</td>
<td>Report on calendar events that you have access to view in e-Builder. For example, a list of meetings that you created on a specific project.</td>
</tr>
<tr>
<td>Attendees</td>
<td>Report on who attended calendar events. For example, report on the number of times each member of your team attended the weekly status meeting.</td>
</tr>
</tbody>
</table>
1.6.2.7 Combined Reports

The Combined reports option enables you to report on data in both the Schedule and Cost modules of e-Builder in the same report. If your account is not using both the Cost & Schedule modules, then you will not see it listed as an option.

The columns available for selection will include both Schedule and Cost fields.
The Administrative reports option enables the e-Builder administrator(s) to report on user and project information to help manage their account.

The types of administrative reports that can be run are as follows:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Membership</td>
<td>Report on the Account Roles for the users on the account. For example, report on the users in the architect role to verify that all new architects have been added to it.</td>
</tr>
<tr>
<td>Project Membership</td>
<td>Report on which projects each user has been added to. For example, report on the membership of a new project to verify that all appropriate users have been added to it.</td>
</tr>
<tr>
<td>User Details</td>
<td>Report on any of the user information fields. For example, a list of users located in a specified city or state or number of times they have logged in.</td>
</tr>
<tr>
<td>Project Activity</td>
<td>Report on high level project usage information. For example, report on how many files have been saved on all projects to verify that users are storing their information in the e-Builder documents module.</td>
</tr>
<tr>
<td>Audit Log</td>
<td>Report on activity that has transpired within the Administrative Tools. For example, report on when an administrator added a new project.</td>
</tr>
</tbody>
</table>
The Forms/Workflow reports option enables you to report on data in the Forms module of e-Builder. If your account is not using the Forms module, then you will not see it listed as an option.

The types of form reports that can be run are as follows:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forms Summary</td>
<td>Report on all form types filled out on one or many projects. For example, a summary of all outstanding Change Orders and Action Items on projects in the Southeast region.</td>
</tr>
<tr>
<td>Form Log</td>
<td>Report on the custom fields created for a specific form type. For example, create an RFI log which shows the information requested field and the response for all RFIs on a project.</td>
</tr>
</tbody>
</table>
The Process reports option enables you to report on data in the Process module of e-Builder. If your account is not using the Process module, then you will not see it listed as an option.

The types of process reports that can be run are as follows:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Summary</td>
<td>Report on all process types filled out on one or many projects. For example, a list of all outstanding Change Orders and Action Items on projects in the Southeast region.</td>
</tr>
<tr>
<td>Process Log</td>
<td>Report on the custom data fields created for a specific form type. For example, create an RFI log which shows the information requested field and the response for all RFIs on a project.</td>
</tr>
</tbody>
</table>
1.1.6.3 Select Type of Report

In Step 2 of the Report Wizard you can select the type of report to use. To make a selection click on the radio button for your selection.

Select an option and press next to proceed to Step 3 in the Report Wizard.
1.1.6.3.1 Tabular Reports

A tabular report provides a simple listing of your data without any subtotals.

Reports for a single project with one set of data can be run as tabular reports.

Tip: Use this type for reports such as document logs, and contact lists.
A summary report provides you with the option to sort and subtotal the data in your report.

Reports for multiple projects with different attributes can be run as summary reports (see below for an example).
A matrix report summarizes data in a grid. It allows you to group data in both rows and columns.

Use this type of report to sort by two dimensions on a report. See below for an example where the report is grouped by both project name and year.

**Note:** Always use this report type when running a Cash Flow or Cash Flow Details report.
1.1.6.4 Select Columns

In Step 3 of the Report Wizard you can select the columns to include in your report. To make a selection click on the check box next to the name of the column.

Note: The columns listed will vary based on the type of data selected in Step 1 of the Report Wizard.

Select an option and press Next to proceed to Step 4 in the Report Wizard.

Multivalued Field Option

Notice the option at the top right of this screen, **Return row for each multivalued field value**. e-Builder allows you to split the rows on the report when there is more than one value, for any multiple pick list custom field, multiple checkbox form field, or multiple pick list process data field. The report will display the results on separate lines instead of displaying them on one line.

For example, if the result for a multivalued field is regions Eastern, Northern, and Southern, they will be displayed in the report this way:
In the select columns screen the columns to chose from are divided into sections based on the selections that were made in Step 1 (the type of data). Some of the columns will already be selected when you arrive at this step. To add or remove columns from the report, select the check box next to the name of the column. To add or remove all of the columns in one section click on the Select All or Deselect All link corresponding with the name of that section.
In addition to the fields listed on the Select Columns screen, users can add their own formula columns. A formula column will allow you to perform mathematical functions on the data in one or more columns.

To create a formula column, click on the New link next to the name of the Formula Columns section at the bottom of the page. A new Internet Explorer will then open where you will create the new formula. To add fields to the formula, select the field from the drop-down list and press the Insert button. Use the buttons beneath the word Operators to insert mathematical functions into the formula. You are also able to type the name of a field, or operator manually by clicking in the formula box with your mouse. When finished creating the formula, press the Done button to complete the process.
In Step 4 of the Report Wizard you can select the aggregate functions to include in your report. To make a selection click on the check box corresponding to your selection.

Select your option(s) and press next to proceed to Step 5 in the Report Wizard.
Using the Sum Summary Field

The Sum aggregate function totals the values of the column that it is selected for. It will be available on every report type for the Record Count column. Using the sum field on the record count column will provide a total for the number or records returned on the report.

The sum option will also be available for other columns that have numeric values, such as Budget or Actual Cost columns.
1.1.6.5.2 Average Summary Field

Using the Average Summary Field

The Average aggregate function takes an average of the values of the column that it is selected for. It will also return the average of any columns that are grouped (see below).

The average option will be available for columns that have numeric values, such as Budget or Actual Cost columns.
1.1.6.5.3 Largest Value Summary Field

**Using the Largest Value Summary Field**

The Largest Value aggregate function returns the largest value from the column that it is selected for. It will also return the largest value from any columns that are grouped (see below).

The largest value option will be available for columns that have numeric values, such as Budget or Actual Cost columns.

The Largest Value result will be displayed as Max.
The Smallest Value aggregate function returns the smallest value from the column that it is selected for. It will also return the smallest value from any columns that are grouped (see below).

The smallest value option will be available for columns that have numeric values, such as Budget or Actual Cost columns.
The % Total aggregate function provides information on the percentage of the total for items on a report that are **grouped** (see below). For example, if the first group in the report has 10 and the total is 100, then the % total will display 10%. It will always add to 100% in the Grand Totals row located at the bottom of the report.

**Tip:** If you are using a Tabular report then the % Total function will not provide any value, as it will only display the 100% indicator at the bottom of the report.

The % Total option will be available for columns that have numeric values, such as custom fields that are of type integer or decimal and Budget or Actual Cost fields, to name a few.
Order of Columns-Reports

In Step 5 of the Report Wizard you can select the order of the columns included in your report. They will be displayed from left to right when the report is run. To move a column, click on the name of the column in the middle box, and press either the Top, Up, Down, or Bottom button.

Note: The columns listed will vary based on the columns selected in Step 3 of the Report Wizard.

Make your selections and press next to proceed to Step 6 in the Report Wizard.
1.1.6.7 Select Grouping

If you have selected either a Summary or Matrix report in Step 2 of the Report Wizard then Step 6 will be Select Grouping, otherwise you will be directed to the Specify Filter step.

Select your option(s) and press next to proceed to Step 7 in the Report Wizard.
Groupings for Summary Reports
If you selected a summary report in Step 2 of the Report Wizard, you can select one or two fields to summarize the information by.

To select a field by which to summarize the information, click on the drop-down list beneath the label Summarize Information By and select the appropriate field. The options are dependent upon what type of data is being reported on (Step 1 of the Report Wizard). The sort order box (in the middle) allows you to display the results in either Ascending or Descending order. The Group Dates by option (on the right) will be selectable if you are grouping by a date field. The options allow you to group by:

- Date
- Week
- Month
- Quarter
- Year
- Fiscal Quarter
- Fiscal Year

Select your option(s) and press Next to proceed to Step 7 in the Report Wizard.

When two row groupings are selected, the report will first summarize the data by the top selection and then by the second.
1.1.6.7.2 Grouping for Matrix Reports

**Groupings for Matrix Reports**
If you selected a Matrix report in Step 2 of the Report Wizard, you are able to group both rows and columns on your report.

For details on summarizing the rows please refer to Grouping for Summary Reports. To select a column to summarize the information by click on the drop-down list beneath the label Summarize Information By (under Select Column Grouping), and select the appropriate field. The options are dependent upon what type of data is being reported on (Step 1 of the Report Wizard). The sort order box (in the middle) allows you to display the results in either Ascending or Descending order. The Group Dates by option (on the right) will be selectable if you are grouping by a date field. The options will be to group by:

- Date
- Week
- Month
- Quarter
- Year
- Fiscal Quarter
- Fiscal Year

Select the option(s) desired and click Next to proceed to Step 7 in the Report Wizard.

The report output will summarize the data into summary rows and columns, as shown below.

Tip: When running a cash flow report, the Matrix report type must be used.
1. Specify Filter-Report Wizard

**Specify Filter - Report Wizard**
Specify filter is the last step in the Report Wizard. It is step 6 when using a Tabular report, and step 7 when using a Summary or Matrix report.

**Standard Date Filter**

In this section, there is a drop-down for selecting the date fields available for just this report type (a subset of the fields in the full filter below).

The Duration drop-down includes a 'Custom' selection, along with other selections for Fiscal Year, Fiscal Quarter, Calendar Year, Calendar Quarter, Month, and Weekday. When an option is chosen, the user is shown what the corresponding dates would be as of the current moment. 'Custom' is the default (no start or end date are populated).

These standard filter values are saved with the report's definition.

![Image of Report Wizard]

**Filter Criteria**

Select the desired option(s) and press Run Report to display the results of the report.
Overview of Using Report Filters

The specify filter step allows you to use up to five search rules in your report. With these search rules the results of the report can be limited to show only a specific sub-set of the data that you have access to. For example, this is useful in cases where it is not necessary to include all projects on a report. Additionally, you are also able to use the same single project report for any project.
Filter Search Rules-Reports
To create a search rule select the drop down box next to the phrase Search Rule #1. Then chose the appropriate field, the options will be based on the type of data included.

After selecting the search rule field, the middle box will be available to modify the filter. If you select a date field then there will be more options in the drop down list.

The box on the right is where you complete the search rule. If there is a modifier that can be used enter it here. For some fields, a Lookup button is available. The lookup button will prompt you to select from the options that are available as filters for the selected field. Press the Lookup button and a new Internet Explorer window opens with options can be selected.

Select the check box(es) next to the appropriate selections and press the Insert Selected button to add the option(s) to the report. The Lookup window will then close and the specify filter screen will reflect the selections that you have made.

To limit the report results to only one project, check the box next to the phrase, Must select a project while running the report. If this option is checked you will be prompted to select a project each time the report is run.
1.1.7 Edit an Existing Report

1.1.7.1 Overview/Reference-Reports

Users may find it easier to modify an existing report to achieve the necessary output than it is to create a new report. Both account level and user's personal reports can be modified and saved for later use.

To edit an existing report from the main reports module screen, click on the Edit link next to the name of the report. You will then be directed to the report wizard, and modifications can be made from there.

A report can also be edited after it has been run. From the report results screen press the Edit button to return to the Report Wizard and modify the report.
### 1.1.7.2 Saving Your Report

After a report has been updated it can be either saved under a new name, or saved with its changes under the same name.

To modify a report and save it with the same name, press the Save button. If it is an account level report (one that is not in your personal reports folder) then the Save button is only available to e-Builder Administrators.

If it is already saved in your personal folder then you will be prompted to confirm the name of the report. Press the Save button to complete the process.

An e-Builder Administrator will also have the option of saving the report for other users. To save the report for other users select the radio button to make the report available to all users or to make the report available to the following roles. If you select to make it available only to certain roles then select the names of the roles and press the Add button.
1.1.8 Deleting a Report

To delete a report from the main reports module screen, click on the Delete link next to the name of the report.

You will then be prompted to confirm the deletion. Press the Yes, Delete the Report button to confirm.

If it is an account level report (and you are not an e-Builder administrator) then you will be unable to delete the report. Press the OK button to return to the previous screen.
1.1.9 Report Subscriptions

Any report that is saved can be subscribed to. Being subscribed to a report means that the report is automatically run and the results are sent to you via e-mail at a specified (recurring or non-recurring) time and date.

For more details on subscribing to a report please see My Setup - Report Subscriptions.