



University of Missouri System

eBuilder Training

# Process Module Overview

- Important Terms
- Important Concepts
- Process Landing Page
- Understanding a Process
- Delegation Feature
- Troubleshooting Hints
- eBuilder Administrator Capabilities
- Processes
- Questions

Terms	Descriptions
Account Level Role	Roles, when added to, that will automatically be assumed when added as a participant to a project. Also see Project Level Roles.
Actor	A person who can “Take Action” by moving a process instance to the next step.
Commitment	Refers to money obligated to a consultant or contractor in eBuilder. (i.e.: Agreements, Contracts, POs, etc.)
Controlling Process	The process through which cost has been implemented into the system. This is only displayed for cost-enabled processes.
Cost-enabled Process	A process that integrates with cost items such as budget changes, commitments and invoices.
Court	eBuilder uses the “Ball in Court” analogy to refer to items you are responsible for in a workflow process.
Initiator	A user who can start (initiate ) a workflow process instance.
Mail Merge	A step in a process that will merge data with a template to create documents such as agreements, contracts, NTPs, etc.
Project Level Roles	Roles that are configured and managed at the project. Also see Account Level Roles.
Process Instance	This provides insight to the process current state. Accessed by clicking into the process link.
Project Participants	A subcategory of Project Details that allows you to view participants and their roles on the project.
Spawned	A process step that initiates another process.
Take Action	Selecting and using the “Take Action” button in a process instance.

- 95% of the interaction with project(s) will be done through workflow processes
- You can only initiate a process via a project
- Processes can be initiated and acted on by internal users and external users with the correct permissions
- Processes will automatically place attachments in the correct folder in the Document Module
- You can transfer your workflow items through:
  - Access Delegation – for a duration of time (under Setup/My Settings/Personal Information/Access Delegation)
  - Delegate Button – one time action in a process instance
  - Reassign Work (eBuilder admin function)
- A SPAWNED process will initiate a new process in draft mode and requires an actor to submit it
- In eBuilder, child projects are not required for multiple construction contracts



Recent Pages...

## Project Menu

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

Project Processes AC500540 - SHSMO Center for Missouri Studies - Bouse, Chuck

Filter by...

Information on process instances within a project.

Allows you to start processes, filter your view and configure table layout

Start process

Filters

Instance	State	Subject	Step	In Step Since	Total Age (days)	Status	Responsible Actors	Date Due
CA - 1	Closed	GCA Approval for Gould Evans (GCA - 5005-03 - 1)	Finish	May 23, 2019	27	Approved		
CA - 3	Closed	GCA Approval for CCS Group (GCA - De5005-05 - 3)	Finish	May 23, 2019	24	Approved		
CA - 4	Closed	SCA Approval for Gould Evans (SCA - 04 - 1)	Finish	May 30, 2019	7	Approved		
CA - 5	Closed	SCA Approval for Engineering Surveys & Services (LSA - -02 - 3)	Finish	Jun 3, 2019	0	Approved		
DBB - 1	Closed	5005-4 River City DBB Contract	Finish	May 2, 2019	0	Void		
GCA - 03 - 1	Closed	UM SYSTEM CC500540 GCA Approval for Gould Evans, P.C.	Finish	Apr 26, 2019	2	Void		
GCA - 5005-03 - 2	Closed	GCA Approval for Gould Evans	Finish	Apr 26, 2019	0	Void		
GCA - De5005-05 - 3	Closed	GCA Approval for CCS Group	Finish	Apr 29, 2019	3	Void		

**Note:** Majority of interactions with a project in eBuilder is done through a workflow process. The Processes "Landing Page" allows you to initiate and manage workflow processes within your project.

## Configure Table Layout

You can customize which columns you see by clicking the ellipse.

Start process

Filters 3



Step	Total Age (days)	In Step Since	Status
Finish	0	Feb 14, 2019	Submitted
Finish	0	Feb 14, 2019	Submitted
Finish	0	Feb 14, 2019	Approved
Finish	0	Feb 14, 2019	Approved
Finish	0	Feb 19, 2019	Approved
Finish	0	Mar 7, 2019	Approved
Finish	0	Jan 15, 2019	Approved
Finish	0	Jan 21, 2019	Approved
Finish	0	Jan 22, 2019	Approved
Finish	8	Jan 30, 2019	Approved
Finish	158	Oct 4, 2019	Finished
Finish	29	Oct 4, 2019	Approved
Finish	29	Oct 4, 2019	Approved
Bldg TEST	150	Oct 4, 2019	Finished
Finish	0	Sep 13, 2019	Approved
Finish	0	Sep 13, 2019	Approved
Finish	0	Sep 19, 2019	Approved

**Columns**

- Instance
- State
- Subject
- Step
- Total Age (days)
- In Step Since
- Status
- Responsible Actors
- Date Due
- Accepted By
- Counter
- Counter Prefix
- Created By
- Created By Company

Cancel Apply

Rearrange columns by dragging the headers. You can re-sort using the arrows.

Filter by...

Draft Open Closed



Instance	State	Step	Total Age (days)	Subject
AES - 1	Closed	Finish	0	A/E Selection request by Liza MMcKenr
AES - 2	Closed	Finish	0	A/E Selection request by Liza MMcKenr
AES - 3	Closed	Finish	0	A/E Selection request by Liza MMcKenr
AES - 4	Closed	Finish	0	A/E Selection request by Liza MMcKenr
AES - 5	Closed	Finish	0	A/E Selection request by VickieMoore-0
AES - 6	Closed	Finish	0	A/E Selection request by VickieMoore-0
ASI - 1	Closed	Finish	0	dddd
ASI - 2	Closed	Finish	0	Adjusted Schematics ASI-7b
ASI - 3	Closed	Finish	0	Greg and Greg caused problem in the f
ASI - 4	Closed	Finish	8	Architectural Supplemental Instruction
BPA - 1	Closed	Finish	158	Permit for approval. Smith Bldg MS&T
BPA - 2	Closed	Finish	29	Test permit approval Sept 05_2019
BPA - 3	Closed	Finish	29	Test permit Rev1 Sept 05_2019
BPA 1 - 1	Closed	Finish	150	TEST Request for Office renovation per
CA - 1	Closed	Finish	0	Test WA (WA - 1)

**Filters** - Allows you to filter the view of the table layout



Subject	In Step Since
GCA Approval for Gould Evans (GCA - 5005-03 - 1)	May 23, 2019
GCA Approval for CCS Group (GCA - De5005-05 - 3)	May 23, 2019
SCA Approval for Gould Evans (SCA - 04 - 1)	May 30, 2019
SCA Approval for Engineering Surveys & Services (LSA - -02 - 3)	Jun 3, 2019
5005-4 River City DBB Contract	May 2, 2019
UM SYSTEM CC500540 GCA Approval for Gould Evans, P.C.	Apr 26, 2019
GCA Approval for Gould Evans	Apr 26, 2019
GCA Approval for CCS Group	Apr 29, 2019
GCA Approval for ENGINEERING SURVEYS AND SERVICES LLC	Apr 29, 2019
Budget Change	Sep 10, 2019
UM SYSTEM CC500540 October Change Orders Budget Move Project Budget Re-Allocation or Change	Oct 29, 2019
ProjectManager, Patrick - 04/09/2024	Apr 9, 2024
SCA Approval for Gould Evans	May 23, 2019

Showing result 1 - 13 of 13

### Filters (3) Reset X

Process

- All Processes
- In My Court
- Initiated By Me

- Draft
- Open
- Closed

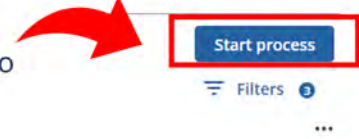
Status

Step

Live view

Cancel Apply

**Start Process** – You will be presented with a list of processes you can initiate. You can also type in the search box



### Select process X

**(TEST ONLY) 1.25 Campus Building Permit and Plan Review process (PER)**  
 This process is to be used to initiate the permit application, request approval for use of the IEBC code, and document plan code reviews.  
 Made active on 8/22/22 for testing purposes.

**01.10 - Project Status and Details Update (PJTUP)**  
 This process will allow updates to be made to reflect the current project details or project status- can be updated during design or construction phases.

**01.40 - M&R Annual Permit task work flow (MRT)**  
 This process is used to document Maintenance and Repair annual permit task requests and to record inspections that were performed under the annual permit.

**10.00 - Project Authorization (Budget Establishment) (PA)**  
 Process to obtain approvals and establish approved Budget in e-Builder.

Download Start



Project Menu

- Details
- Planning
- Forms
- Issues
- Processes

Project Processes [C9999999 - Sample Test Project Columbia - Copeland, Bill]

Unfinished Drafts

Start INV

Filter by... INV

PROCESSES REPORTS

Instance	State	Subject	Step	Date Created	In Step Since	Status	Responsible Actors
INV - 1	Open	UM SYSTEM C9999999 *ZP Inc TEST   Invoice Number: INV - 00001	Payment Hold - Contract Admin	Mar 14, 2024	Mar 14, 2024	Submitted	Annie Accounting, Bill Copeland

Step with two Responsible Actors

Page View 250

**70.00 - Invoice Approval (INV) - 1** Send to Next Step

Workflow Override All Fields View Instructions

Project: Sample Test Project Columbia	Project Number: C9999999
Process Document: INV - 1	Overall Due Date:
<a href="#">Show History</a>   <a href="#">Current Actors</a>	Step Due Date:
Current Workflow Step: Payment Hold - Contract Admin <a href="#">Show Workflow Diagram</a>	
Subject: UM SYSTEM C9999999 *ZP Inc TEST   Invoice Number: INV - 00001	
Status: Submitted	

[Details](#)
[Comments \(0\)](#)
[Documents \(1\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)
[Attached Viewpoints \(0\)](#)

Expand All | Collapse All

**Helpful Information**

Please verify the Builder's Risk Insurance Expiration date has not passed on the original commitment. This can be updated in the custom fields tab on the commitment. If you have any questions, please contact an e-Builder admin.

Actions to be taken:

Allows you to accept or decline responsibility for this step

Allows you to delegate this one instance to another user

Helpful Information

## Page Layout

Red arrows point to tabs that contain useful info

70.00 - Invoice Approval (INV)

Start Process

Project: Sample Test Project System  
Project Number: U9999999  
Process: 70.00 - Invoice Approval

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

### Project Information

**Instructions**

**For Construction and Design Contracts only**

Actions to be taken:

- Submit** - Begin the approval process of the invoice. The invoice will be sent to Campus Facilities Accounting Staff for review.
- Save** - Draft status, allows the user to save information about the invoice without sending it for the approval. Users will have to open the process again to submit or delete the process.

Please provide substantial completion certificate and a closeout letter. Once this information is received a final payment can be made.

\* is this the Final Pay Application Request?:  No

\* Vendor Invoice #: Please enter the vendor invoice number. A maximum number of 25 characters can be used.

\* Billing Period Start Date:

\* Billing Period End Date:

\* Description of Work/Services Performed:

**Commitment Invoice Details**

Status: Draft

\* Commitment: CA - 00001 - S&T U9999999 SCA Approval for "Sample Company (SCA - T)"

Company/Contract: Sample Company

A	B	C	D	E	F	G	H	I	J	K	L	M	N	
Item #	Description of Work	Budget Code with Description	Scheduled Value	Work in Place From Previous Application(s)	This Period	Total Materials Presently Stored	Current Work Invoiced This Period	Current Payment Due	Total Completed and Stored to Date (D + E + F)	% (G / I)	Balance to Finish (C - G)	Retainage Release Amount	Retained This Period	Amount Less Retainage
001	Asbestos Testing	750000-0800	1,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	1,000.00	0.00	0.00	0.00
<b>Total</b>			1,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%	1,000.00	0.00	0.00	0.00

Supporting Documentation

Certified Payroll:  or

Diversity Documentation:  or

Supporting Documentation Attached:

Certified Payroll

Diversity Documentation

Payment Application

\* Payment Application:  or

Progress Schedule:  or

Red \* are required fields

Cost-enabled processes will always have an associated Commitment (Agreement/Contract/Blanket).

Dynamic grids allow you to enter multiple line items.

## 70.00 - Invoice Approval (INV) - 1

Accepted By: Bill Copeland

-- Please select an action --

Take Action

Check Spelling

Print

Copy

Del

Project:	Test Project Col	Project Number:	C9999999
Process Document:		Overall Due Date:	
Current Workflow Step:	Payment Hold - Contract Admin	Step Due Date:	
Subject:	UM SYSTEM C9999999 *ZP Inc TEST   Invoice Number: INV - 00001		
Status:	Submitted		

1

2

3

Show History

Current Actors

Show Workflow Diagram

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

Expand All | Collapse All

Please verify the Builder's Risk Insurance Expiration date has not passed on the original commitment. This can be updated in the custom fields tab on the commitment. If you have any questions, contact your e-Builder admin.

Actions to be taken:

- **Verified** – this will send the process to the Campus Accounting Staff for review.

### 1 Show History

#### Routing History

Routing History History

Details

Name: INV - 1  
Status: Submitted

Routing History

Show Workflow Cancel

Steps

Export

#	Step Name	Actor	Action	Due Date	Completed	Age(d)	Status
1	Start	Bill Copeland	Submit		03.14.2024 06:58 AM	0	Completed
2	Is Null		false		03.14.2024 06:58 AM	0	Completed
3	Import		false		03.14.2024 06:58 AM	0	Completed
4	Is Invoice Unique?		true		03.14.2024 06:58 AM	0	Completed
5	Con, Contract?		false		03.14.2024 06:58 AM	0	Completed
6	Agmt Ins Exp?		true		03.14.2024 06:58 AM	0	Completed
7	Payment Hold - Contract Admin	Bill Copeland	Verified		03.14.2024 07:03 AM	0	Completed
8	Con, Contract?		false		03.14.2024 07:03 AM	0	Completed
9	Agmt Ins Exp?		true		03.14.2024 07:03 AM	0	Completed
10	Payment Hold - Contract Admin	Current Actors..				29.1	In Progress

Data Fields (12) Comments (0) Documents (0) Attached Processes (0) Attached Forms (0) Attached Viewpoints (0)

Export

Data Field	Edit User	Edit Date	Old Value	New Value
Subject	Bill Copeland	03.14.2024 06:58AM		[No Subject]
Billing Period End Date	Bill Copeland	03.14.2024 06:58AM		03.29.2024
Billing Period Start Date	Bill Copeland	03.14.2024 06:58AM		03.01.2024
Campus Fiscal Officer?	Bill Copeland	03.14.2024 06:58AM		Yes
Description of Work/Services Performed	Bill Copeland	03.14.2024 06:58AM		Work performed on project plus materials
Is this the Final Pay Application Request?	Bill Copeland	03.14.2024 06:58AM		No

Values of Data Field Changes

## 70.00 - Invoice Approval (INV) - 1

Accepted By: Bill Copeland

2

### Current Actors

Project:	Sample Test Project Columbia	Project Number:	
Process Document:	INV - 1	Overall Due Date:	
Current Workflow Step:	Show History   Current Actors	Step Due Date:	
Subject:	en INV -		
Status:			

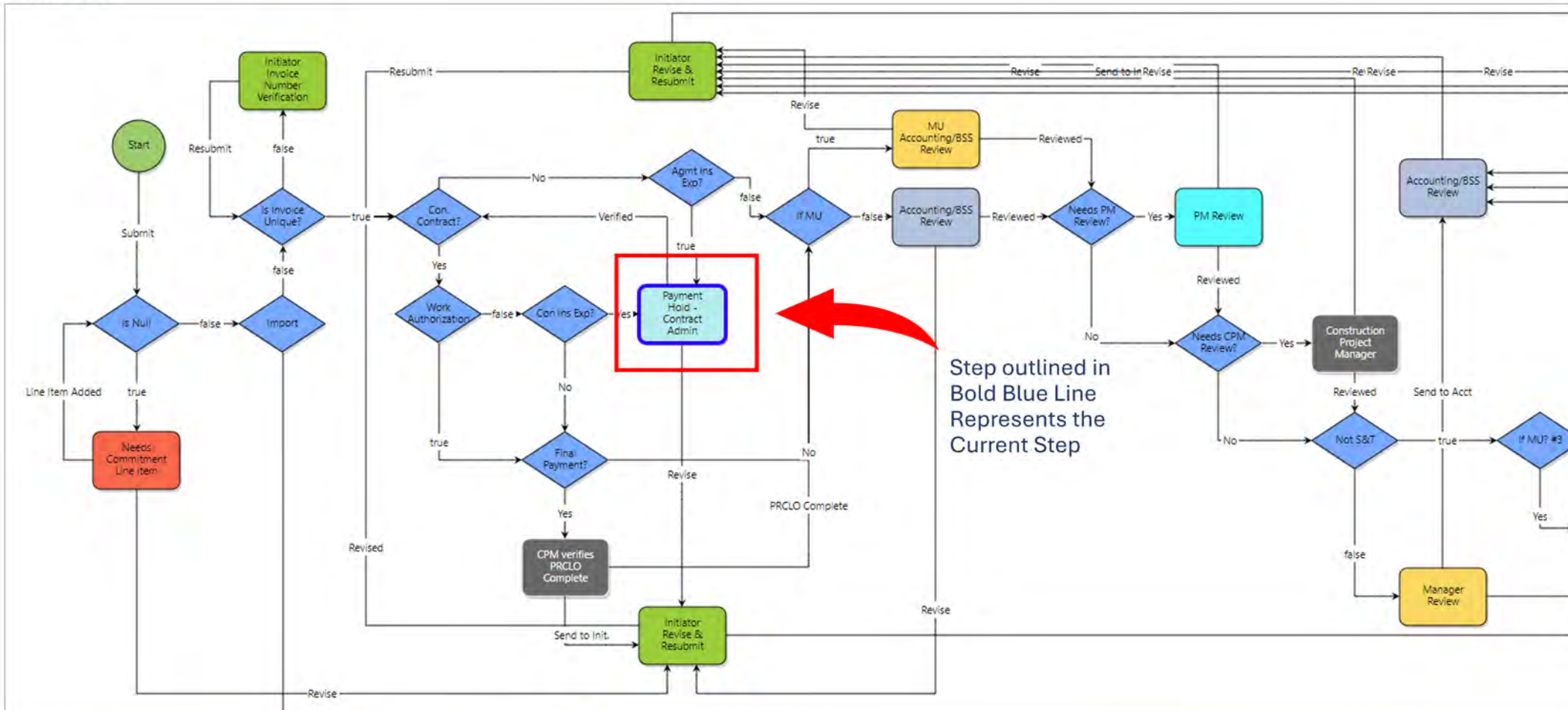
Actor	Action Taken	Actor Type
Accounting, Annie		Step Actor
Copeland, Bill		Step Actor

Details Comments (0) Documents (0)

Expand All | Collapse All

## INV - 1 3 Workflow Diagram

Graphical View

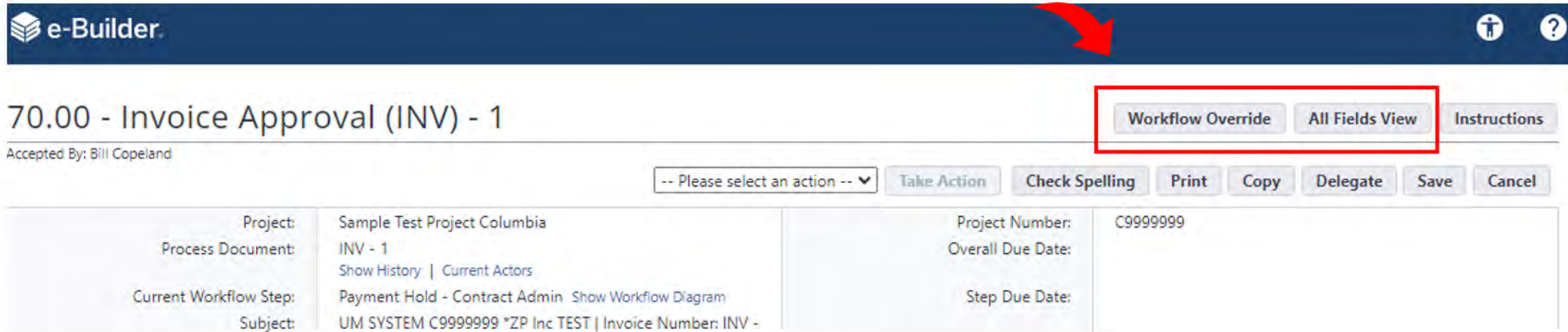


Step outlined in Bold Blue Line Represents the Current Step

## Functions eBuilder Admins can use to help you:

- Workflow Override – allows admins to move workflow to a different step.
- All Fields Layout – allows admins to update data in a workflow.


**Note:** Only users with Admin roles can see these buttons.



The screenshot shows the e-Builder interface for a workflow titled "70.00 - Invoice Approval (INV) - 1". The header bar contains the e-Builder logo and user icons. Below the header, the workflow title is displayed. A red box highlights two buttons: "Workflow Override" and "All Fields View". To the right of these buttons is an "Instructions" button. Below the buttons is a row of action buttons: "Take Action", "Check Spelling", "Print", "Copy", "Delegate", "Save", and "Cancel". A dropdown menu is visible above the "Take Action" button, showing "-- Please select an action --". The main content area displays project details:

Project:	Sample Test Project Columbia	Project Number:	C9999999
Process Document:	INV - 1	Overall Due Date:	
	<a href="#">Show History</a>   <a href="#">Current Actors</a>	Step Due Date:	
Current Workflow Step:	Payment Hold - Contract Admin <a href="#">Show Workflow Diagram</a>		
Subject:	UM SYSTEM C9999999 *ZP Inc TEST   Invoice Number: INV -		

From the **Global Tabs** click on Setup\My Settings\Personal Information\Access Delegation:



## Access Delegation

Access Delegation Management | Access Delegation History

**Filter Delegations**

User:  Status: All

Start Date: From:  To:  End Date: From:  To:

Clear Filter

Action	Current Status	Access Type	User	Start Date	End Date	Notes
	Active	Granted Access From	General Contractor	09.05.2023 2:00 pm	12.31.2030 11:30 pm	
	Active	Granted Access From	Director Role	09.05.2023 2:30 pm	12.31.2030 11:30 pm	
	Active	Granted Access From	Annie Accounting	09.12.2023 9:00 am	12.31.2026 11:30 pm	
	Active	Granted Access From	Patrick ProjectManager	09.13.2023 8:00 am	12.31.2027 5:30 pm	
	Active	Granted Access From	eBuilder Admin Group	10.27.2023 11:30 am	12.21.2040 11:30 pm	

Grant Access  Request Access

Check Spelling Grant Clear

\* Select User:

Filter Users by Role: All Roles

Users: Please select...

Enter username:

←

\* Access Duration:

Start Date & Time: 04.12.2024 9:30am

End Date & Time:

Notes:

Check Spelling Grant Clear

You can Grant and Request Access

Complete the following fields and click Grant below

## List of Processes

01.00 – New Project Request	30.10 – DBB Construction Contract	50.10 – Request for Information
01.10 – Project Status and Details Update	30.15 – Change Order/Amendment Request	50.20 – Architectural Supplemental Instruction
10.00 – Project Authorization (Budget Est)	30.20 – DB Contact Approval	60.05 – Substantial Completion Acceptance
10.05 – Project Budget Re-Allocation/Change	30.30 – CMR Commitment Approval	60.10 – Project Closeout
10.20 – Work Authorizations	30.40 – MCA Work Authorization	60.20 – Project Closeout – Consultant
10.50 – Schedule of Values	30.80 – Notice to Proceed	60.30 – Project Closeout – Contractor
20.10 – Standard Consultant Agreement	40.10 – Planning Phase Review	70.00 – Invoice Approval
20.30 – General Consultant Agreement	40.20 – Schematic Design Review	
20.50 – Geotechnical Engineer Agreement	40.30 – Design Development Review	
20.60 – Land Surveyor Agreement	40.40 – Construction Document Review	

Project Lifecycle					
Planning / Design			Construction		
Initiation	Planning	Design	Construction	Construction Close-out	Project Close-out
01.00 - NPR					
	01.10 - Project Status and Details Update				
	10.00 - Project Authorization (Budget Est.)				
	10.20 - Work Authorizations				
	20.00 - A/E Selection				
	40.10 - Planning Phase Review				
		10.05 - Project Budget Re-Allocation/Change			
		20.10 - Standard Consultant Agreement			
		20.30 - General Consultant Agreement			
		20.50 - Geotechnical Engineer Agreement			
		20.60 - Land Surveyor Agreement			
		30.10 - DBB Construction Approval (DBB)			
		30.15 - Change Order/Amendment Request			
		30.20 - DB Contract			
		30.30 - CMR Commitment Approval			
		30.40 - Master Construction Agreement			
		40.20 - Schematic Design Review			
		40.30 - Design Development Review			
		40.35 - %Construction Document Review			
		40.40 - Construction Document Review			
		01.15 - Building Permit Process			
		70.00 - Invoice Approval			
			10.50 - Schedule of Values		
			30.80 - Notice to Proceed		
			50.10 - Request for Information		
			50.20 - Architectural Supplement Instruction		
			60.05 - Substantial Completion Acceptance Process		
				60.10 - Project Closeout	
				60.20 - Project Closeout - Consultant	
				60.30 - Project Closeout - Contractor	

The End  
Questions?