

Create A Summary Notification

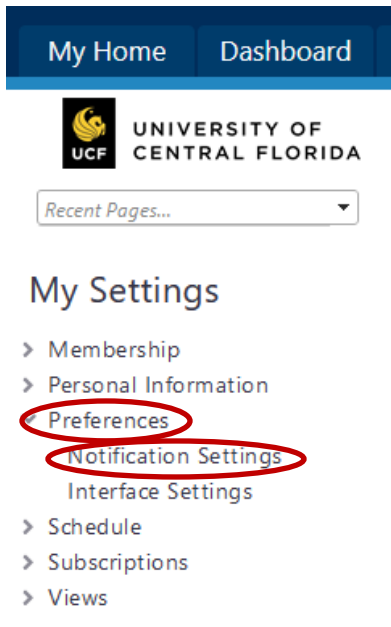
e-Builder sends e-mail notifications to users whenever something of interest happens on a project such as a process instance arriving in your court or someone requesting that you leave a comment. These e-mails can be overwhelming and can easily slip through the cracks of the day. eB can send you a single customized notification that summarizes your relevant activities each day, week, or month depending on settings you choose.

To create a summary notification:

- 1) In e-Builder, click on Setup at the top of the page.

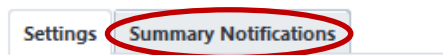


- 2) On the left side of the Setup page, click on Preferences to expand the submenu, then click on Notification Settings.

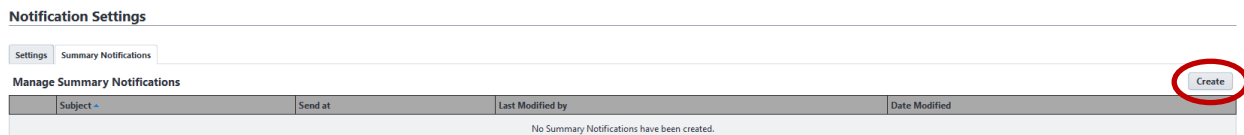


- 3) On the Notification Settings, click the Summary Notifications tab.

Notification Settings



- 4) On the Summary Notifications screen, click the Create button on the right side of the page.



- 5) The Create Summary Notification page appears. From here you can set how often you receive the summaries, when they are sent to you, and which information they contain.

Create Summary Notification

Details Save Cancel

Template	Select Template
* Subject	
* Module(s)	
* Send Daily Summary at	9:00 AM

Save Cancel

- 6) Use the Template dropdown box to select whether you want a daily, weekly, or monthly summary. For this exercise, let's choose a daily summary. This will auto-fill the remaining fields. By default, eB wants to send updates on all of the major modules. You likely do not need all of them. Click the X in the module boxes to delete any you do not need, such as Calendar.

Create Summary Notification

Details Save Cancel

Template	Daily Summary
* Subject	Daily Summary
* Module(s)	Forms x Cost x Schedule x Calendar x Processes x Bidding x Submittals x Project Issues x
* Send Daily Summary at	10:30 AM

- 7) Choose a time of day that you want to receive the summary.

Create Summary Notification

Details Save Cancel

Template	Daily Summary
* Subject	Daily Summary
* Module(s)	Forms x Cost x Schedule x Calendar x Processes x Bidding x Submittals x Project Issues x
* Send Daily Summary at	10:30 AM

- 8) Select notifications to include in the summary. Each module has a list of types of notifications that can be sent. Check the box on the right of each line to include that type of notification. Click the Save button when finished.



Select notifications to include in daily Summary Notification [?](#)

[Expand All](#) | [Collapse All](#)

Bidding Notifications			
<input type="checkbox"/>	Bid Access Request	A non-invited user has requested access to a bid package	<input type="checkbox"/>
<input type="checkbox"/>	Bid Question Received	A bidder has submitted a bid question	<input type="checkbox"/>
<input type="checkbox"/>	Bid Response Received	A bidder has changed their bid status	<input type="checkbox"/>
<input type="checkbox"/>	Reopen Bid Request	A bidder has requested that a bid be reopened	<input type="checkbox"/>
Calendar Notifications			
<input type="checkbox"/>	Event Accept Notification	Your calendar event invitation has been accepted	<input type="checkbox"/>
<input type="checkbox"/>	Event Declined Notification	Your calendar event invitation has been declined	<input type="checkbox"/>
<input type="checkbox"/>	Event Tentative Notification	Your calendar event invitation has been tentatively accepted	<input type="checkbox"/>
Cost Notifications			
<input type="checkbox"/>	Cost Entity Approval Requested	An approval for a cost entity has been requested	<input type="checkbox"/>
<input type="checkbox"/>	Cost Entity Approved	A cost entity has been approved that you requested approval on	<input type="checkbox"/>
<input type="checkbox"/>	Cost Entity Rejected	A cost entity has been rejected that you requested approval on	<input type="checkbox"/>
Forms Notifications			
<input type="checkbox"/>	Action Req'd - Form Placed in Court	A form is in your court	<input type="checkbox"/>
<input type="checkbox"/>	Comment Made on Form	A comment has been added to a form	<input type="checkbox"/>
<input type="checkbox"/>	Form Closed	A form has been closed	<input type="checkbox"/>
<input type="checkbox"/>	Form Forwarded	A form you have been copied on has been forwarded to another user	<input type="checkbox"/>
<input type="checkbox"/>	Form Opened	A form has been reopened	<input type="checkbox"/>
<input type="checkbox"/>	Form Replied	A form you have been copied on has been replied to	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Form Filled Out	You have been copied on a form that has been filled out	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Form Updated	A form has been updated	<input type="checkbox"/>
Processes Notifications			
<input type="checkbox"/>	Action Req'd - Actor	A process instance is in your court	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Delegated	A user has delegated full authority of a process to you	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Delegation Declined	A user has declined to act on a process instance	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Forwarded	A user has forwarded a process instance to you	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Replied	A user has replied to a process instance	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Spawn Error	An error occurred when spawning a process	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Workflow Error	An error occurred while moving a process between steps	<input type="checkbox"/>
<input type="checkbox"/>	Comment Responded	An external user has responded to your request for comment	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Accept Notice	A user has accepted ownership of a process instance	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Action Taken	A user has taken action on a step	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Actor has been Removed	Actor(s) have been removed from a process instance, additional information is required to complete the action	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Comment Added	A comment has been added to a process	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Step Notifications	A process instance has moved between steps	<input type="checkbox"/>
Project Issues Notifications			
<input type="checkbox"/>	Action Req'd - Project Issues Placed in Court	A Project Issue is in your court	<input type="checkbox"/>
<input type="checkbox"/>	Comment Made on Project Issue	A comment has been added to a Project Issue	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Project Issue Filled Out	You have been copied on a Project Issue that has been filled out	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Project Issue Updated	A Project Issue has been updated	<input type="checkbox"/>
<input type="checkbox"/>	Project Issue Closed	A Project Issue has been closed	<input type="checkbox"/>
<input type="checkbox"/>	Project Issue Forwarded	A Project Issue you have been copied on has been forwarded to another user	<input type="checkbox"/>
<input type="checkbox"/>	Project Issue Opened	A Project Issue has been reopened	<input type="checkbox"/>
<input type="checkbox"/>	Project Issue Replied	A Project Issue you have been copied on has been replied to	<input type="checkbox"/>
Schedule Notifications			
<input type="checkbox"/>	Action Req'd - Comment Requested	A comment has been requested on a schedule	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Comment Requested on Task(s)	A comment has been requested on a task(s)	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Schedule Sent For Review	A schedule has been sent for review	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Task(s) Sent for Review	A task(s) has been sent for review	<input type="checkbox"/>
<input type="checkbox"/>	Task Approval Requested	An approval for an updated task has been requested	<input type="checkbox"/>
<input type="checkbox"/>	Task Updates Approved	A task that you requested approval on has been approved	<input type="checkbox"/>
<input type="checkbox"/>	Task Updates Rejected	A task that you requested approval on has been rejected	<input type="checkbox"/>
Submittals Notifications			
<input type="checkbox"/>	Action Req'd - Comment Requested	A comment has been requested on a submittal package	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Forwarded	A submittal item(s) have been forward to you	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Forwarded for Review	A submittal item(s) has been forwarded to you for review	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Review Completed	A user has marked review complete on a submittal item(s)	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Send to Contractor	A submittal item(s) has been returned to you	<input type="checkbox"/>
<input type="checkbox"/>	Action Req'd - Sent for Review	A submittal item(s) has been sent to you for review	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Forwarded	A user has forwarded a submittal item(s) you have been copied on	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Forwarded for Review	A submittal item(s) you have been copied on has been forwarded for review	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Replied	A user has replied to a submittal item(s) you were copied on	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Review Completed	A user has marked review complete on a submittal item(s) you have been copied on	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Send to Contractor	A submittal item(s) you have been copied on has been returned	<input type="checkbox"/>
<input type="checkbox"/>	FYI - Sent for Review	A submittal item(s) for review you have been copied on has been sent for review	<input type="checkbox"/>
<input type="checkbox"/>	Sub's Reply	A sub has replied to a submittal item in their court	<input type="checkbox"/>