

## Creating and Managing Custom Views

e-Builder allows you to create your own custom views for each of the major modules. You can set up predefined filters for Bidding, Projects, Forms, Processes, and much more. This can be a major timesaver when you want to drill down to specific information at a glance. You can create as many custom views as you want, edit them at any time, disable them if you don't need them available, and delete them if you are truly finished with them.

There are two types of views in eB: Account and Personal. Account views are created and maintained by the eB Administrator. With a few exceptions, Account views are available to all eB users. Personal views are created and maintained by individual users (like you!) and are only available to the person who created them. Remember that either type of view will only show you projects to which you have access. If you create a particularly useful Personal view that would benefit other users, ask the eB Administrator about creating an Account view from it.

For this example, we will create a new Project view. Project views are one of the most useful custom views you can create considering how often you spend navigating around the Projects tab.

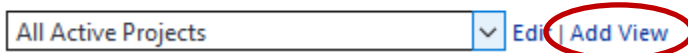
To create a custom view:

- 1) In e-Builder, click on the Projects tab.



- 2) Look at the Projects dropdown box. You can click on that box to change your current view. By default, you have access to Account views, but now we are going to create a Personal view. Click on Add View.

### Projects



- 3) This is the Add View page where you set up all of the options you want on your Personal view. You will give the view a name, configure the search criteria, arrange the columns, and finally set the sort view. Let's create a view that shows us your active projects sorted by client name. You'll also want to include relevant project information in your view such as PDC Project Number, UCF Building Number, Room Number, and Priority.



### Add View

**View Name** Save Cancel

\* Name:

#### Search Criteria

Search in:  All Projects  Projects I Administer

Search Rule #1:    and

Search Rule #2:    and

Search Rule #3:    and

Search Rule #4:    and

Search Rule #5:

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 yes/no or on/off fields, "1" equals yes or on, and "0" equals no or off.

#### Columns Displayed (numbered left to right)

\* Column 1:

Column 2:

Column 3:

Column 4:

Column 5:

Column 6:

Column 7:

Column 8:

#### Sort View

Sort Column:   Ascending  Descending

Save Cancel

4) Start by typing the view name in the Name box. Call it "Active Projects by Client Name".

**View Name** Save Cancel

\* Name:

5) Set the Search Criteria. Leave the All Projects option selected. For Search Rule #1 we want to filter our view to only active projects. In the first dropdown box, choose Project Status. In the second dropdown box, select Equals.

#### Search Criteria

Search in:  All Projects  Projects I Administer

Search Rule #1:     and

- 6) We need to fill in that third box. You could type directly into it, but let's make it easy and instead click the Lookup button. This will open a popup window in which you can pick items from a list instead of typing them in. Select both Active-Funded and Active-Not Funded statuses, then click Insert Selected.

**Lookup** (Select the values to add below)

Insert Selected Cancel

<input type="checkbox"/>	Value
<input type="checkbox"/>	Active-Funded
<input type="checkbox"/>	Active-Not Funded
<input type="checkbox"/>	Administrative
<input type="checkbox"/>	Awaiting Customer
<input type="checkbox"/>	Cancelled
<input type="checkbox"/>	Close-out
<input type="checkbox"/>	Close-out - MAJOR
<input type="checkbox"/>	Completed
<input type="checkbox"/>	Inactive
<input type="checkbox"/>	Temp Hold

Insert Selected Cancel

Active-Funded and Active-Not Funded are automatically filled into the third box.

Search Rule #1: Project Status equals Active-Funded,Active-Not Funded Lookup and

- 7) You could continue to add up to a total of five search criteria when you create your own views, but for this example we are moving on to the next section.
- 8) In the Columns Displayed section, choose which information from the Project Details page you want in your view. For this example, choose the items shown here, but when you create your own view, you can choose anything on the list in whichever order you want.

You do not have to use all eight columns in your view. Here we are leaving Column 8 blank.

**Columns Displayed (numbered left to right)**

* Column 1:	PDC Project Number	Column 2:	Project Name
Column 3:	Description	Column 4:	Client
Column 5:	UCF Building Number	Column 6:	Room Number(s)
Column 7:	Priority	Column 8:	

- 9) Finally, set the Sort View to choose how the information will be sorted. We want to sort by client name, so choose Client in the dropdown box. Then click Save.



Sort View

Sort Column: Client  Ascending  Descending

Save Cancel

10) You are taken back to the Projects tab with your new view displayed. It should look something like this.

PDC Project Number	Project Name	Description	Client	UCF Building Number	Room Number(s)	Priority
UCF-603	UCF-603 81003 College of Nursing Building	Design and construction of the College of Nursing building at the Lake Nona Campus.		1003		5 - Routine
21040001	21040001 B0040 ENGI RM 468 Electrical and Internet Rework for Lab	Computer Lab upgrade by remodeling to remove all tables work benches, case work on the wall, carpet. To remodel the lab with 3-4 electrical power poles in the mid of the lab with receptacle/internet and new carpet and paint.	Abdul Benwali	0040	0468	3 - Expedite (education/improvements)
22007002	22007002 B0007 Farrell Commons Student Services F Office Actuator Installation	We want to add an actuator to one of our offices in the Student Accessibility Services' suite so it is more accessible for individuals with wheelchairs, RM 0185M.	Adam Meyer	0007F	0185M	3 - Expedite (education/improvements)
19053005	19053005 B0053 CREOL Replace BAS controls	Consolidate building automation controls under single BACnet-compatible system (PRP-338)	Alberto Santoni	0053	throughout	4 - Expedite (non-education/improvements)
22051002	22051002 B0051 Replacement of VAB MDP in Electrical Room 162	Replacement of damaged Main Distribution Panel in Electrical Room 162 and all damaged feeders, breakers, panels, etc.	Alberto Santoni	0051	0162	2 - Urgent (basic human needs projects)
19150001	19150001 80150 Bldg 150 Secondary Utility Feed	Design and Construct secondary bypass power for dispatch. Current system has single power feed running through UPS to service this area. This does not allow for maintenance. New transformer/panel/bypass feed will be installed so power is on at all times	Alberto Santoni	0150	TBD pending final scope	5 - Routine
23053001	23053001 B0053 CREOL RM 180 Replace HVAC DX and Controls	Replace HVAC DX unit and controls in CREOL 180	Alberto Santoni	0053	0180Q0180AA0180B0180C0180D0180E0180F0180G0180H0180J	5 - Routine

Like everything else in eB, these views are all driven by the data entered into the system, so if a Project Details page is missing information such as Room Number, then that field will be blank on a view. You can go to the Project Details page and enter that missing information to make it appear on a view if you have access to edit that data field. Other views pull data from different places, so for instance a Cost view would heavily rely on accurate budget information to be useful.

11) You can sort other columns from this page if needed. Suppose you want to temporarily list these projects by Priority instead of by Client. Click on the Priority column header to list the projects by Priority instead.

PDC Project Number	Project Name	Description	Client	UCF Building Number	Room Number(s)	Priority
2304001	2304001 B0904 Rosen College Housing Boiler Safety Additions	Boiler Room Electrical Modifications for Safety	Jaime Morales	0904	N/A	1 - Emergency
21903002	21903002 B0903 Rosen Chilled Water Pipe Repair	To replace chilled water piping housed within the 12 rooftop AHU's. Current piping is corroded and one unit failed. Further failure is imminent. Also need to replace piping inside the building leading up to the AHU's.	Alexander Fountain	0903	n/a	2 - Urgent (basic human needs projects)
22906004	22906004 B0906 CMB Air Quality Improvement Electrical HEERF	Electrical upgrades to support new RTU Install - Project connected to 22906001 - Please see 22906001 for Record Documents	Nate Boyd	0906	All Rooms	2 - Urgent (basic human needs projects)
22132001	22132001 B0132 TWR 3 Fire Panel System Replacement	Phase 1: Replacement of Fire Alarm Panel and purchase of FA devices for installation in Phase 2; Phase 2: Installation of new fire alarm devices and CO detection.	Amy Childs	0132	n/a	2 - Urgent (basic human needs projects)
22CWP001	22CWP001 JCI Central Station Monitoring Radio Mesh	Take the current Radio Mesh network that reports to UCFFD dispatch and have it report to JCI Central Station	John McInerney	CWP	n/a	2 - Urgent (basic human needs projects)
22133001	22133001 B0133 TWR 4 Fire Panel System Replacement	Replace Fire Alarm Control Panel, smoke detectors, pull stations, duct detectors. Add CO detectors in boiler room and gas shut off valve.	Alexander Fountain	0133	n/a	2 - Urgent (basic human needs projects)
22916001	22916001 B0916 Upgrade DTC CWP Capacity for Redundancy -HEERF	Upgrade Chiller plant for capacity and redundancy to serve DTC chilled water needs as RTU's at CMB are getting replaced with CHW options. The CHW plant will need expansion into the reserve bays available from original construction.	Nate Boyd	0916	All Rooms	2 - Urgent (basic human needs projects)

To edit, delete, or hide a view:

1) In e-Builder, click on the Setup tab.



- 1) In Setup, go to My Settings and click on Views on the left side of the page. This will expand the Views menu to show you all of the different kinds of views you can manage. Click on Projects under the Views menu. This will take you to the Manage Views page.

## My Settings

- > Membership
- > Personal Information
- > Preferences
- > Schedule
- > Subscriptions
- ▼ **Views**
  - Bidding
  - Calendar
  - Companies
  - Contacts
  - Cost
  - Documents
  - Forms
  - Processes
  - Projects**
  - Schedules
  - Tasks

### Manage Views

Project Views		Type	Status
<b>Edit   Copy   Delete</b>	Active Projects	Account	Active
<b>Edit   Copy   Delete</b>	All Canceled Projects	Account	Active
<b>Edit   Copy   Delete</b>	All Close-out Projects	Account	Active
<b>Edit   Copy   Delete</b>	All Completed Projects	Account	Active
<b>Edit   Copy   Delete</b>	All Current Projects (Active-New, Active, Awaiting Customer, Temp Hold, Close Out)	Account	Active
<b>Edit   Copy   Delete</b>	All Projects (any status - eB Admin View-Only)	Account	Active
<b>Edit   Copy   Delete</b>	All Projects Awaiting Customer	Account	Active
<b>Edit   Copy   Delete</b>	All Temp Hold Projects	Account	Active
<b>Edit   Copy   Delete</b>	Building Name/Number/Address Update	Personal	Active
<b>Edit   Copy   Delete</b>	High Priority Projects	Account	Active
<b>Edit   Copy   Delete</b>	LEED / SCIP	Personal	Active
<b>Edit   Copy   Delete</b>	Newly Created Projects	Account	Active
<b>Edit   Copy   Delete</b>	Sort By Building Number	Personal	Hidden
<b>Edit   Copy   Delete</b>	Sort Projects by Building Name	Account	Active
<b>Edit   Copy   Delete</b>	Sort Projects by Building Number	Account	Active
<b>Edit   Copy   Delete</b>	Sort Projects by PRP Number	Account	Active

- 2) From here you can Edit which will take you to the Edit View screen which is functionally identical to the Add View screen, Copy which allows you to copy a view so you can then edit the copy and make minor changes instead of creating a similar view from scratch, and Delete which will permanently delete the selected view. You can only delete Personal views, not Account views. If an Account view is not applicable to you and you want it removed, use the Status dropdown



on the right of the page to change Active to Hidden. Remember to click Save Changes when you are finished.