

Creating and Managing Custom Views

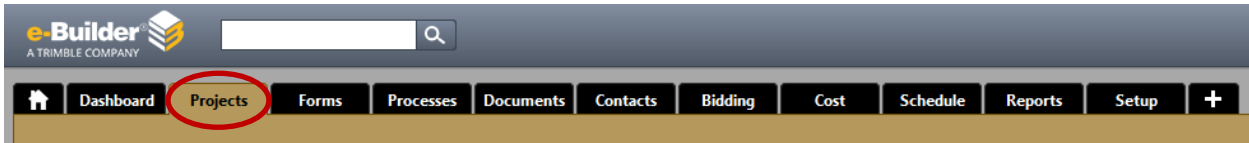
e-Builder allows you to create your own custom views for each of the major modules. You can set up predefined filters for Bidding, Projects, Forms, Processes, and much more. This can be a major timesaver when you want to drill down to specific information at a glance. You can create as many custom views 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.

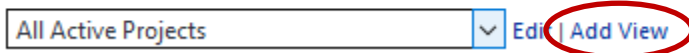
To create a custom view:

- 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 Project ID Number, 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:	<input type="text" value="Project Name"/>	Column 2:	<input type="text" value="City"/>
Column 3:	<input type="text" value="State / Province"/>	Column 4:	<input type="text" value="Site Administrator"/>
Column 5:	<input type="text"/>	Column 6:	<input type="text"/>
Column 7:	<input type="text"/>	Column 8:	<input type="text"/>

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: Lookup and

- 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 and Active-New statuses, then click Insert Selected.

Lookup (Select the values to add below)

<input type="checkbox"/>	Value
<input checked="" type="checkbox"/>	Active
<input checked="" type="checkbox"/>	Active-New
<input type="checkbox"/>	Administrative
<input type="checkbox"/>	Awaiting Customer
<input type="checkbox"/>	Cancelled
<input type="checkbox"/>	Close-out
<input type="checkbox"/>	Completed
<input type="checkbox"/>	Inactive
<input type="checkbox"/>	Temp Hold

Active and Active-New are automatically filled into the third box.

Search Rule #1: equals and

- 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.
- 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:	<input type="text" value="Project ID Number"/>	Column 2:	<input type="text" value="Project Name"/>
Column 3:	<input type="text" value="Description"/>	Column 4:	<input type="text" value="Client"/>
Column 5:	<input type="text" value="UCF Building Number"/>	Column 6:	<input type="text" value="Room Number(s)"/>
Column 7:	<input type="text" value="Priority"/>	Column 8:	<input type="text"/>

- 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.

Project ID Number	Project Name	Description	Client	UCF Building Number	Room Number(s)	Priority
19128001	19128001 Install permanent AC at NFH	Install permanent AC for Nicholson Field House; to be completed by 7/2/19	Brian Barton	0128	n/a	4 - Expedite (non-education/improvements)
18135020	18135020 FS, Elevator and rust remediation	Correct Fire Sprinkler and elevator issues; Rust remediation.	Brian Barton	0135	Throughout	4 - Expedite (non-education/improvements)
20135001	20135001 Install permanent awning at Gate 18	Install permanent awning at gate 18 to match the one at gate 1.	Brian Barton	0135	n/a	4 - Expedite (non-education/improvements)
172N2004	172N2004 Relocate utilities in area of Bldg 77 expansion	Relocate utilities in area of Bldg 77 expansion (New bldg no. 165)	Brian Barton	ZN2		4 - Expedite (non-education/improvements)
19135015	19135015 Permanent power to field cabanas	Replace extension cords with permanent power conduit to field cabanas at Spectrum Stadium. Requested completion date before 8/1/19	Brian Barton	0135	n/a	4 - Expedite (non-education/improvements)
17016006	17016006 - RELOCATE RECYCLING AREA	RELOCATE RECYCLING AREA BEHIND FACILITIES & SAFETY BUILDING 16A TO AN AREA ON ARA DRIVE. CONSTRUCT CONCRETE PAD AND ACCESS ROAD	Brian Wormwood	0016A		5 - Routine

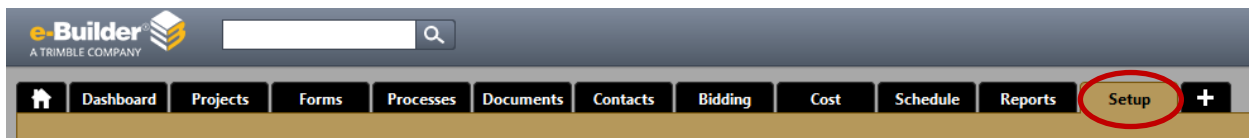
Like everything else in eB, these views are all driven by the data entered into the system, so if a Project Details page is missing information such as Room Number, then that field will be blank on a view. You can go to the Project Details page and enter that missing information to make it appear on a view. 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.

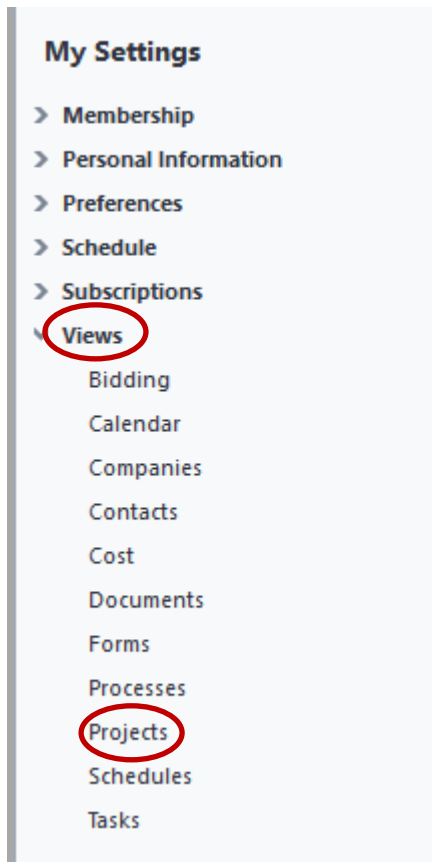
Project ID Number	Project Name	Description	Client	UCF Building Number	Room Number(s)	Priority
19051008	19051008 Phase 2 VAB 104 Upgrade	CHRISTMAS BREAK 2019. REMOVE ELECTRONIC PROJECTOR SCREEN FROM VAB 221 AND INSTALL IN VAB 104. CRESTRON SYSTEM PREVIOUSLY IN VAB 221 INTO VAB 104. SUBSEQUENT WIRING OR ELECTRICAL WORK MAY BE NEEDED TO INSTALL THIS NEWER UNIT.	Joe Muley	0051	0104, 0221	3 - Expedite (education/improvements)
19072001	19072001 UR2 Add access control to doors	Utility building 2 add access control to perimeter doors		0072	n/a	3 - Expedite (education/improvements)
19079005	19079005 Facilitate TV installs in 3rd FI Classrooms	Provide electrical and structural work for TV installs by OIR in Classrooms 301, 303, 307, 303B, 309, 318, 319 & 320	Todd McMahan	0079	301, 303 307, 308, 309, 318, 319 & 320	3 - Expedite (education/improvements)
19123010	19123010 TCH- 325, TF Digital Humanities Makerspaces	RM 0325, Need equipment to facilitate generative research and flexible space in which to house both the equipment and community events. See PRP 392 for more instructions	Bruce Janz	0123	0325	3 - Expedite (education/improvements)
19040006	19040006 Lab 260 Upgrade Eng I	Lab 260 - Add access control to entrance door to replace Leapfrog lock to this open computer lab.	Pete Alfieris	0040	0260	3 - Expedite (education/improvements)
UCF-5788	UCF-5788 UCF Downtown Site Infrastructure	MAJOR PROJECT - UCF Downtown Site Infrastructure	Mike Kilbride	DTC		3 - Expedite (education/improvements)

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.



Manage Views

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