



eBuilder User Guide



Construction Submittal Workflow



Design Review

Collaboration

*Approved Construction
Plan Set*



Getting Started 3

- eBuilder User Guide Audience 3
- eBuilder Video Tutorials 3
- eBuilder Technical Support 3

Workflow 4

- Definitions 4

Purpose 5

- “Start Step” Contractor 5
- Engineer of Record / AE 5
- Contractor Revise and Resubmit 6

Construction Submittal 7

- Process Headers Explained 11
- Process Instance Tabs 12

Getting Started

The City of Miami strives to be a **Service City** every day by streamlining our internal processes; making it easier to register, pay, and receive city services. We introduce eBuilder, a project management system designed to make city construction submittals easier, faster, and available from your home or office computer at any time.

eBuilder User Guide Audience

This guide is intended for individuals who have a working knowledge of the City of Miami's project lifecycle.

eBuilder Video Tutorials

Please visit the **City of Miami's Technology eLearning Hub** on YouTube or Vimeo. Click the links listed below or search for eBuilder on YouTube or Vimeo.

*Note: Videos are in progress.

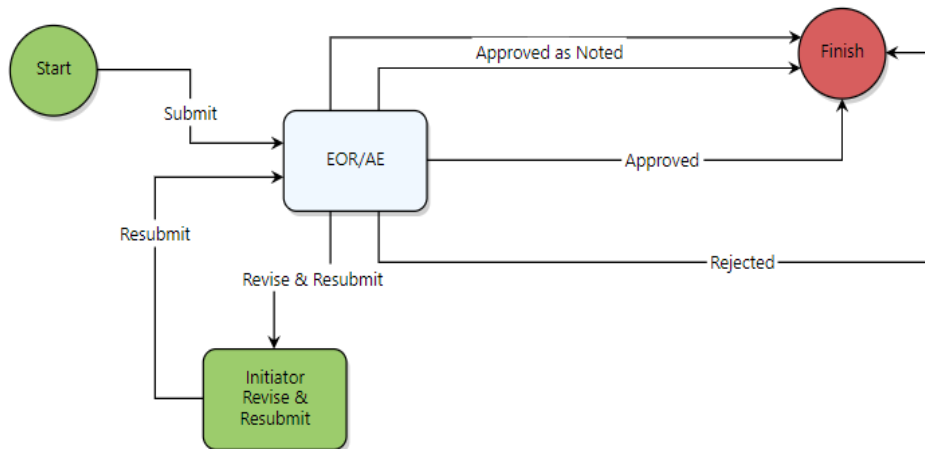
- **YouTube:**
https://youtu.be/C4yyK_t_R2g

eBuilder Technical Support

Please email eBuilder system questions or issues to the eBuilder Technical Support team:

Email: ebuilder@miamigov.com

Construction Submittal (CS) Workflow



Workflow

The construction submittal process in eBuilder is designed to be simple, efficient, and intuitive. eBuilder manages plans submitted by general contractors. For the construction submittal process, the Contractor is an actor within eBuilder who can submit deliverables such as shop drawings, product data, test reports, manuals etc. to the Engineer of Record for review. Upon review, the Engineer of Record has several options. They can Approve, Approve as Noted, or Reject the submittal. If rejected, the initiator or applicant, can revise and resubmit their deliverable.

Definitions

Term	Explanation
Actor	Role defined in the system with various permissions.
Initiator	Person who submits construction plans for approval also known as the Contractor for this process.
Process Headers	Sections of the workflow that offer data including project name, history, a snapshot of the current step, status, number, and relevant dates
Process Instance Tabs	Tabs that allow user to add comments, documents, processes, and forms.



CONSTRUCTION SUBMITTAL ROLES AND PROCESS

Purpose

eBuilder's submittal process helps the team actively manage construction submittals confirming that the contractor's planned work will meet the project's specifications. This process will streamline the project, so the general contractor and the Engineer of Record collaborate within a single system.

"Start Step" Contractor

The Contractor will initiate the process in e-Builder and submit its deliverables for review by the Engineer of Record. Prior to submitting its deliverables, the Contractor should make sure to complete the following:

1. Address all required fields in the process (in red asterisk)
2. Attached copies of its deliverable package (i.e. Shop Drawings, Product Data etc.)
3. Determine whether the deliverable is a substitution and provide a justification if applicable.

Engineer of Record / AE

The EOR/AE should review the submittal information submitted by the Contractor. Once reviewed, the EOR/AE may take one of the following actions:

1. Take the **Revise & Resubmit** action
 - A. The process will return to the Contractor for the contractor to provide additional information or clarification. You will be required to add a Comment.
 - B. The Revision Counter will increment each time the process returns to the Contractor for revision.

Or

2. Take the action is **Approved** action, then the process will advance to **Finish** with a submittal status of **Approved**.
or
3. If **Approved as Noted** is selected, then the process will advance to **Finish** with a submittal status of **Approved as Noted**
or
4. If **Rejected**, the process will advance to **Finish** with a submittal status of **Rejected**
or
5. Take the **Void** action, the process will advance to **Finish** with a submittal status of **Void**

Contractor Revise and Resubmit

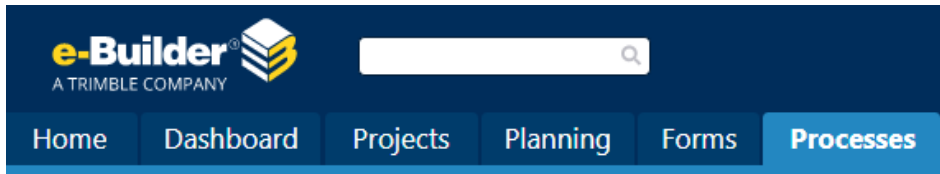
The Contractor should review the Comments tab to determine the need for revision. Once that item has been addressed, the Contractor should complete the following actions:

1. Select **Resubmit**
2. The process will return to the EOR/AE step for further action.

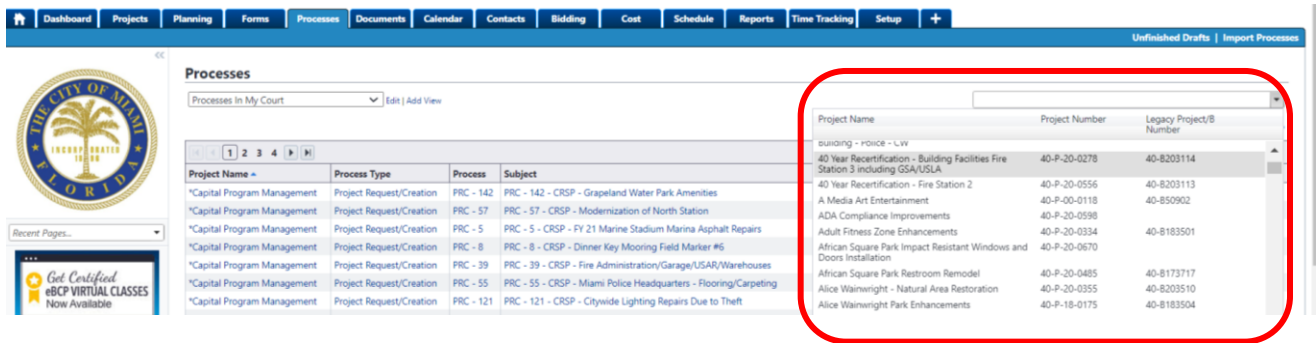
Construction Submittal

Step 1: Log in to eBuilder

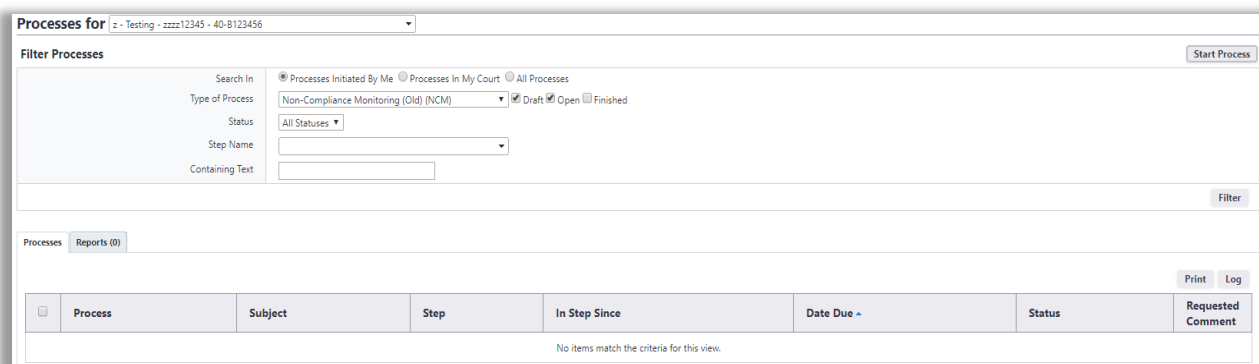
Step 2: Select the **Processes** tab.



Step 3: Select the desired project.



Step 4: Select type of process in the dropdown and click **Start Process**.



Step 5: Select **Construction Submittal (CS)** process. Fill in the required fields that are marked with a red asterisk in order to advance.

Construction Submittal (CS)

Start Process Print Check Spelling Submit Save Draft Cancel

Project: ZUAT - Non-Cost Processes
Project Number: ZZZZZ
Process: Construction Submittal

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

Submittal Info

* Submittal Title: Structural Steel Shop Drawings

Submittal Package Number: CS - 11

Revision:

Review Status:

* Priority: Normal

* Package Contains: Mock-Ups
Operations/ Maintenance Manuals
Product Data
Sample
Shop Drawing

Note: Please hold Ctrl to select multiple items from the list.

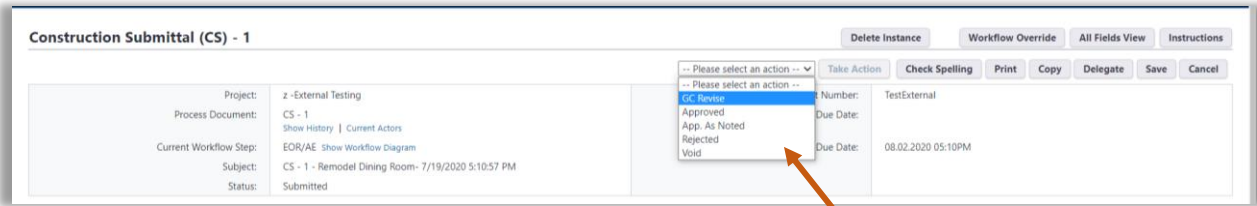
Other Description:

* Spec Section: 051000 - Structural Metal Framing

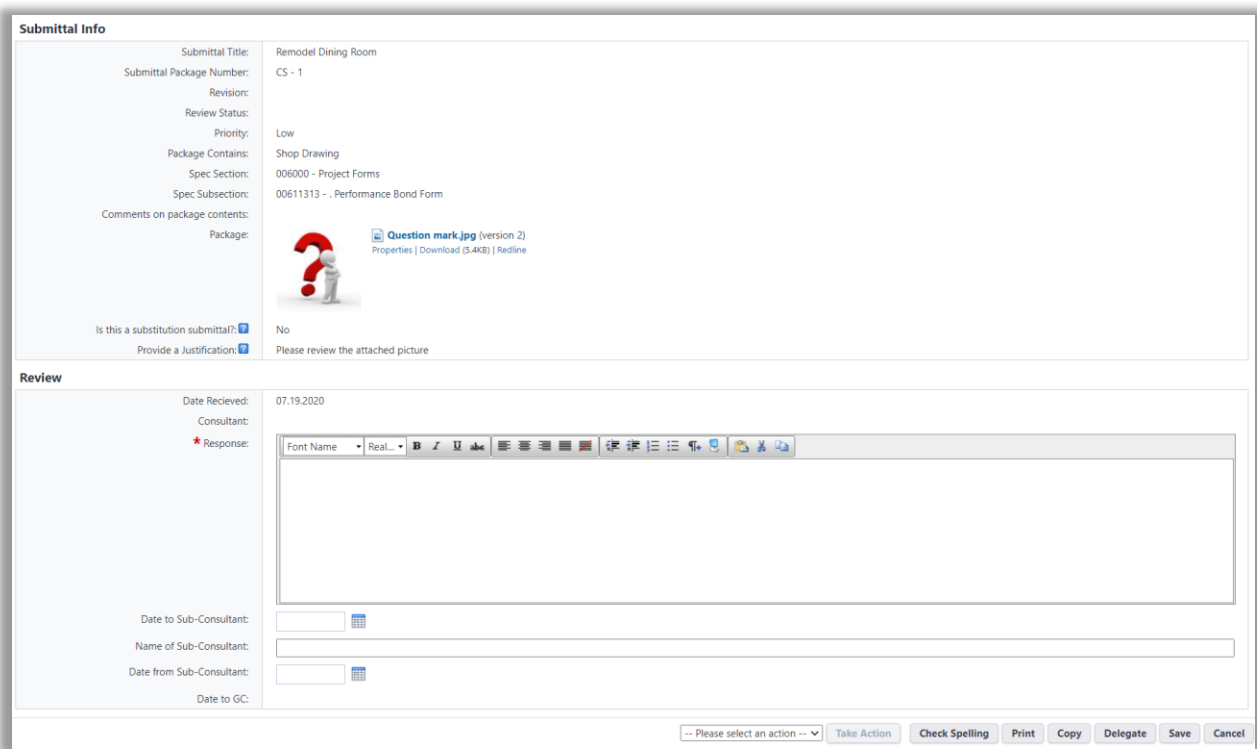
* Spec Subsection: 051200 - Structural Steel Framing

Step 6: When the required fields are complete and the construction submittal is attached, please click **Submit** in the upper right-hand corner of the screen.

Step 7: Upon review, the Engineer of Record has several options: **GC Revise, Approved, Approve as Noted, Void** or **Rejected**.

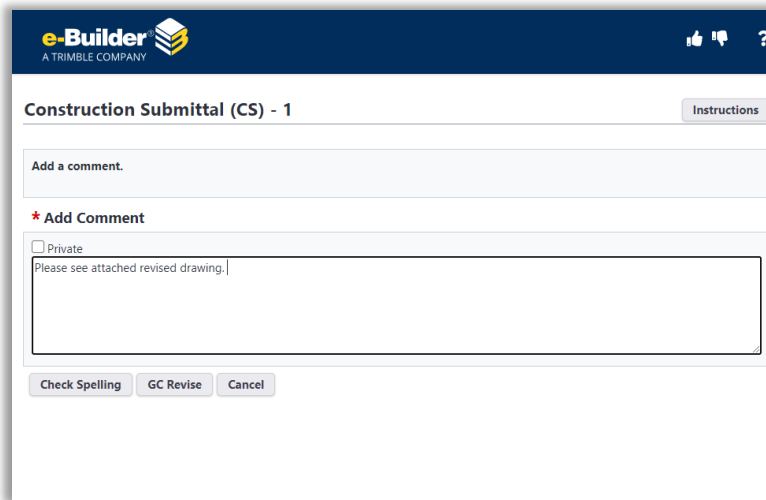


Step 8: Select **Take Action** in order to move the process forward. If the **Save** option is selected, then the process will stay in the reviewer’s queue.

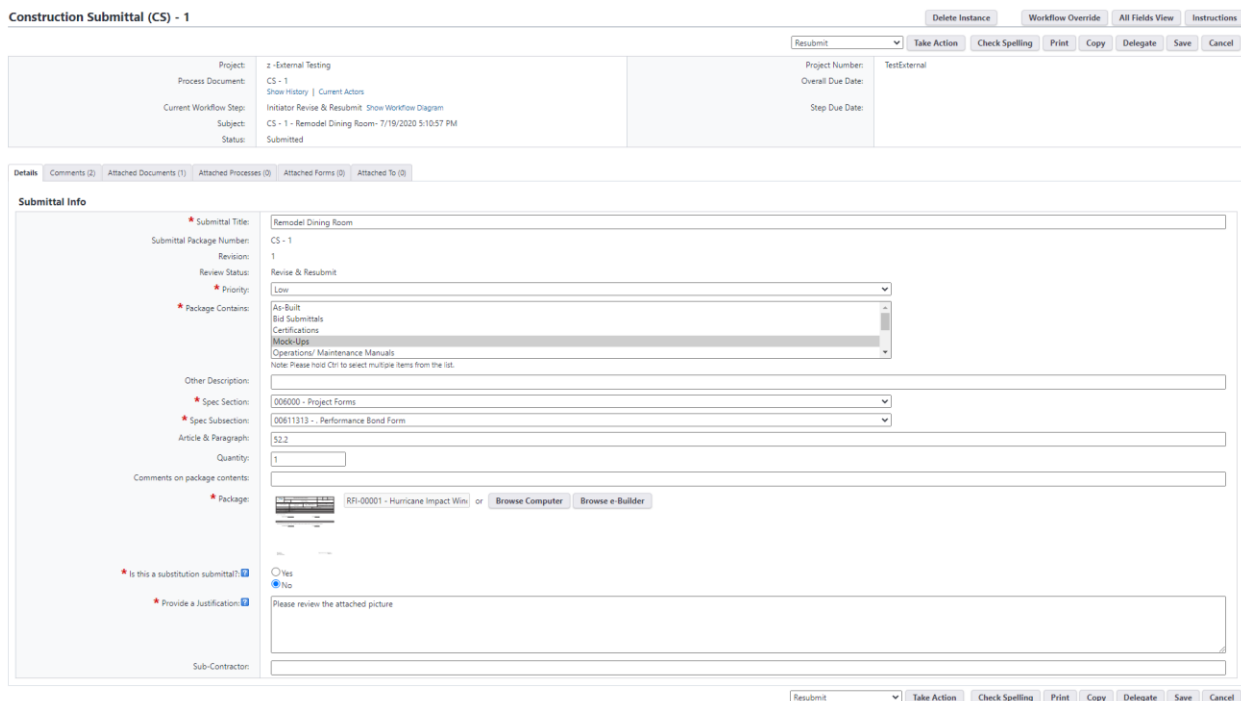


Step 9: If **GC Revise** is selected by the EOR/AE, then the Contractor can revise and resubmit the deliverable. A formal response is required in order to submit a revision.

Step 10: The EOR/AE will need to provide the reasons for the revision as shown below. They will then add a comment and select **GC Revise** in the following screen:



Step 11: The Contractor will receive a notification to view the response and resubmit their plans.



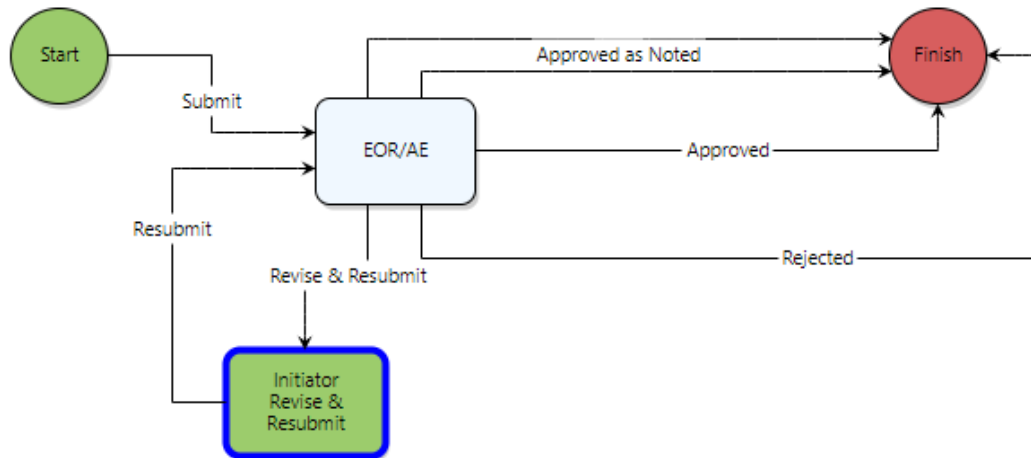
Step 12: The Contractor will need to address the review comments and enter all relevant information and click **Resubmit** and **Take Action**.

Process Headers Explained

The purpose of this is to demonstrate how to navigate within the process. **Show History** will delineate each step and their corresponding time and actor who changed/added to process. **Current Actors** will list all relevant project members.

Project:	z - External Testing	Project Number:	TestExternal
Process Document:	CS - 1 Show History Current Actors	Overall Due Date:	
Current Workflow Step:	Initiator Revise & Resubmit Show Workflow Diagram	Step Due Date:	
Subject:	CS - 1 - Remodel Dining Room- 7/19/2020 6:10:57 PM		
Status:	Submitted		

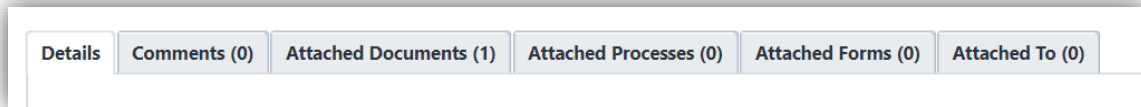
More importantly, the **Current Workflow Step** will demonstrate the current step in which the process resides. The workflow will display the entire process with the current step highlighted in blue.



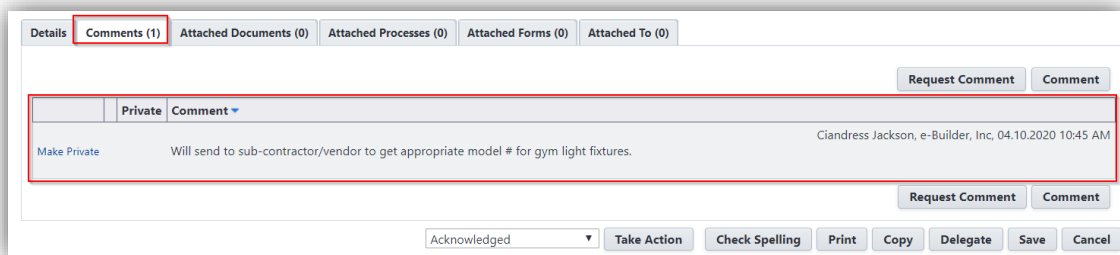
Ensure that all documents, processes, and attached forms are included specifically in the Process Instance Tabs section.

Process Instance Tabs

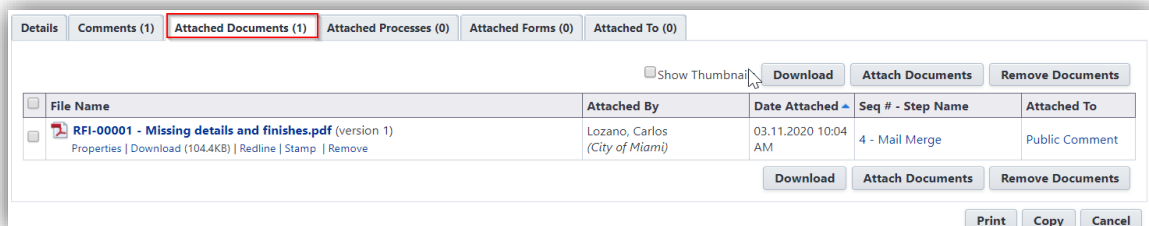
Various tabs allow you to provide substantiating documentation if needed.



Comments: Actor may request internal/external comments and/or leave their own comments. Comments are saved and can be reviewed later.



Attached Documents: Actor may upload documents to attach from their computer or select a file from within the document structure of the current project.



Attached Processes: Displays process instances that have been attached by the current or previous actor(s).

Attached Forms: Displays Forms that have been attached by the current or previous actor(s).

Attached To: Displays where the current process instance is attached within the system.