



# Builterra for External Approvals

JORDAN SHORTT

## Introduction

Builterra is a full-fledged Contract Administration platform made for civil engineers. If you are reading this document, it's likely that an engineering consultant or owner has asked you to approve reports that are made in Builterra. In this document, we will go over your options on approving reports either as a Builterra Viewer or by simply using e-mail.

## Option 1 – E-mail

Regardless of whether you have a Builterra login or not, when an 'Approval Request' is sent to you by the engineer, you will receive an e-mail notification. In this e-mail there will be the following:

- A Standard or Custom message indicating the e-mail purpose
- An attached copy of the report, or a link to the report (depending on size)
- A link to approve the report

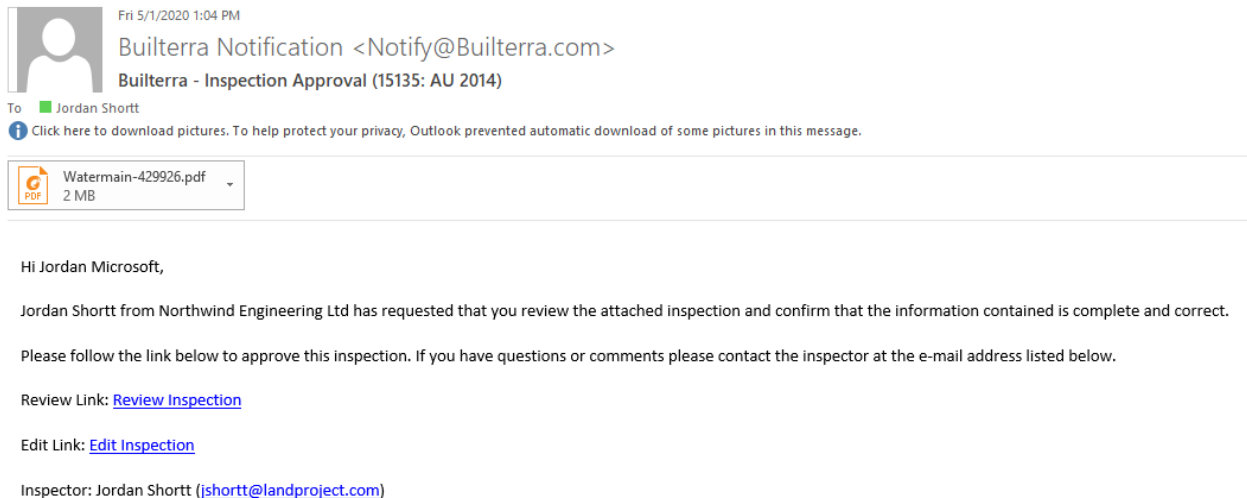


Figure 1 - Example of Approval E-mail

Clicking on the 'Review Inspection' link will bring you to a page where you can approve the report and any other pending reports.

**Review Inspection** [Download](#)

**Name**  
Please enter your name as you would like it to appear on the report.

J. Shortt [Update Signature](#)

By Clicking "Reviewed" you acknowledge that you have reviewed the report and you find it complete and correct.

**Reviewed**

**Outstanding Approvals**

Company	Requester	Report Name	Date	Approve	Download
Northwind Engineering Ltd	Jordan Shortt	1.11 test	Apr 20, 2020 9:35 AM	<a href="#">Approve</a>	<a href="#">Download</a>
Administrator	Jordan Microsoft	External Report Test	Apr 28, 2020 11:28 AM	<a href="#">Approve</a>	<a href="#">Download</a>

Figure 2 - Review Page

In figure 2, you can see that, from top to bottom, you can download the report, fill out your name, add/update your signature, and finally Review the report. Any other pending reports will appear below. Once approved, the engineer will see that you have 'Reviewed' or 'Signed Off' on the report. If you do not agree with the report, simply do not approve the report and contact the engineer to make changes. Once the changes are made, they can send a new request for you to review.

## Option 2 – Free Builterra Account

The recommended workflow for contractors is this:

1. Register for a Free Builterra Account
2. Log into Builterra Periodically and Approve Reports

Automated E-mails are not always perfect. Sometimes e-mails are blocked, can have attachments removed or can be delayed due to throttling. This is due to how e-mails servers work and the restrictions your company's IT may put in place. To avoid this, you can skip the e-mail option and create a free Builterra log in. With an account, you can log in and view your pending approvals – as soon as they are sent.

### Registration

You may receive an e-mail with a registration link if you or the consultant has contacted Builterra to set you up with an account. Otherwise, you can use this link to register each user:

<https://portal.builterra.com/Account/Register>

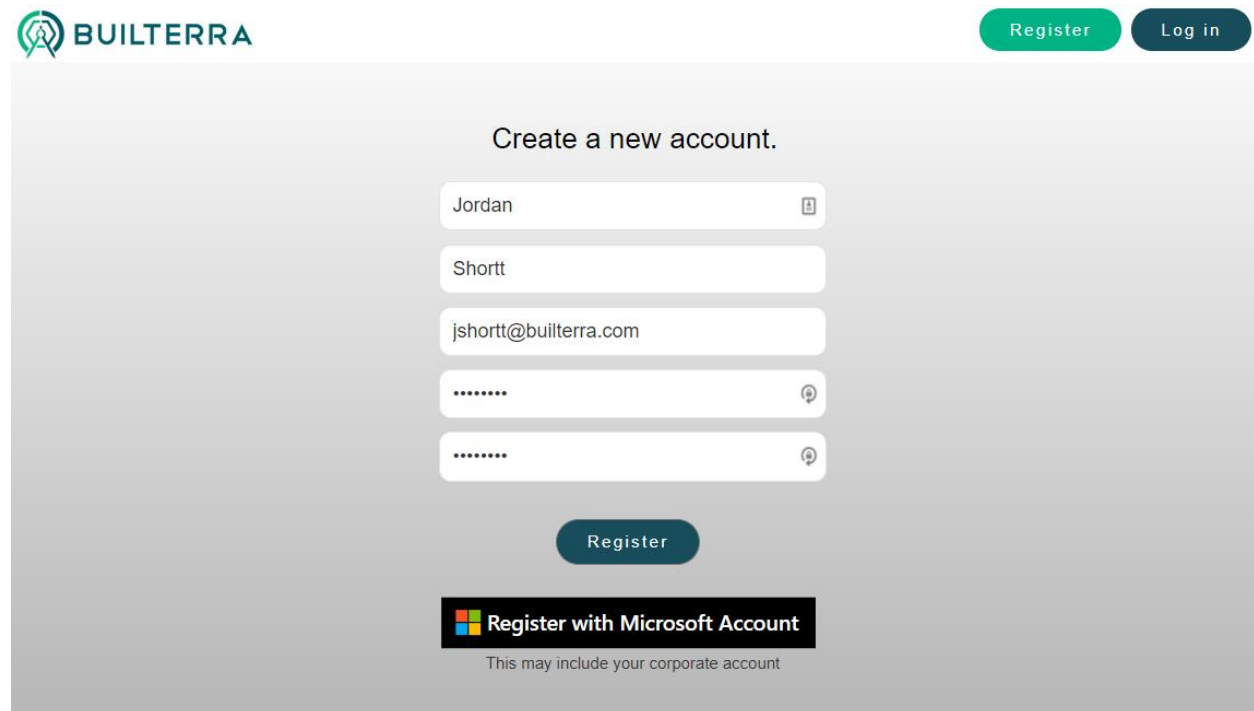


Figure 3 – Registration

On the registration page, fill out your details and create a password. Alternatively, you can register with your existing Microsoft Account that you use for Outlook and other Microsoft 365 products.

## Profile Setup – Adding Signature

Once you've logged in, you'll be greeted by a page with 8 buttons. As a free user, you may not be able to use all of these buttons, but you will be able to access your profile. Click the profile button to edit your profile and add your signature.

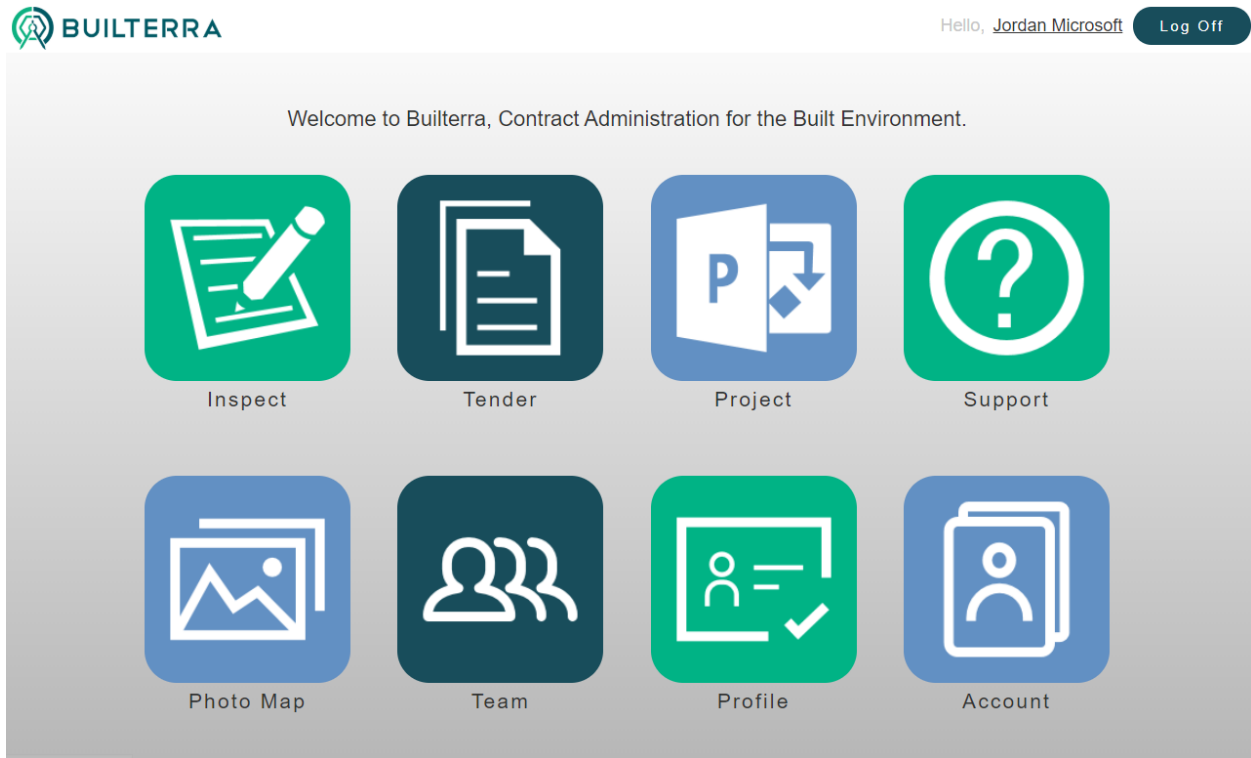


Figure 4 - Welcome Screen with Profile Option

On the profile screen, you can set up details including your signature. Add your signature from a photo file. When approving reports, the signature you upload here may be applied to the pdf copy of the report.

**BUILTERRA** Profile **3** Portal Account Log off

### Manage User Profile

You're logged in as **jshortt@builterra.com**.

User Profile Account Profile Bio Resume Security Settings

First Name	Jordan	Industry	Engineering
Last Name	Microsoft	Work Phone	1-833-289-8600
Designations		Extension	703
Company	Builterra	Cell Phone	226-203-1203
Country	Canada	Website	www.builterra.com
Address 1	1143 Wentworth St. West	Social Link URL	linkedin.com/jshortt
Address 2		Signature	<input type="button" value="Update Signature"/> <a href="#">View</a>
City	Oshawa	Stamp	<input type="button" value="Add Stamp"/>
Prov/State	Ontario	<input type="button" value="Save"/>	
Postal/Zip Code	L1J 8P7		

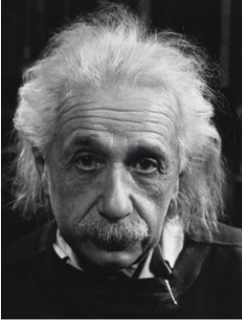


Figure 5 - Profile Screen - upload your signature here

### Approving Reports

When signed in, if any reports are available for approval, you will have a notification on the 'Profile' button on the top right of the screen (seen in Figure 5). Hovering over that menu will show you an option called 'Approvals'. Select this to go to the Approvals screen.

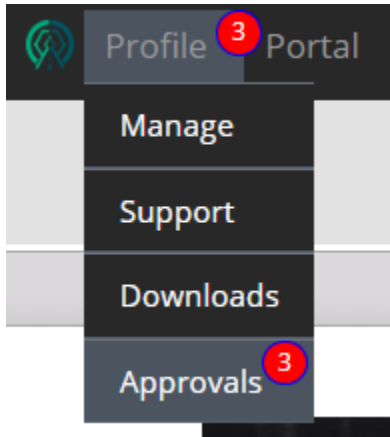


Figure 6 - Approvals Notification