



eBuilder User Guide

Manage User Administrator Guide

(Manage Users, Companies, and Contacts)

Revision History			
Rev #	Reason	Date	Revised By
0	Initial Release	7/1/2024	Bill Copeland

University of Missouri System

COLUMBIA | KANSAS CITY | ROLLA | ST. LOUIS

Manage Users Overview |

This guide provides instructions on how to set up and modify users, companies, and contacts and required Account Level and Project Level Roles. To perform these functions, you must be a member of the admin role **0 – Manage Users**. This role grants you the permissions to:

- Create Users
- Manger User’s Account Level and Project Level Roles
- Manager Project Participants
- Rest Passwords for non-Single Sign On (SSO) Users
- Disable User Accounts

Important Terms:

Terms	Descriptions
Account Level Role	Roles, when added to, that will automatically be assumed when added as a participant to a project. Also see Project Level Roles.
Permissions	Are granted through individual roles.
Project Level Roles	Roles that are configured and managed at the project. Also see Account Level Roles.
Project Participants	A subcategory of Project Details that allows you to view participants and their roles on the project.
SSO	Single-Sign-On

Important Concepts:

- User Accounts can include both Internal and External Users of eBuilder
- UM System Single-Sign-On (SSO) requires **username@UMSystem.edu** email for User ID
- Roles that start with **0 – admin roles**, 1 – internal roles, and 2 – external roles
- Permissions are granted to users through roles
- New vendors need to be added to PS and eBuilder prior to initiating a process with a commitment
- All users in the *(MU, S&T, UMSL or UMKC) Template project will be added to all newly created projects
- Do NOT **Remove** user accounts – they are needed to reassign work and to maintain history

New User Setup – Check List:



1. Add New User
2. Add Account Level Roles
3. Add to Campus Projects and Project Template
4. Add Project Level Roles

Tip: Use Email and Chat addresses and other useful information from Outlook.

A screenshot of a user profile in Outlook. The profile is for Bill Copeland, an E-BUILDER ADMINISTRATOR in the Facilities Planning and Dev department. The profile includes a profile picture with the initials 'CB', a status indicator showing 'Available - Free on 6/24' with work hours from 7:00 AM to 4:00 PM, and a local time of 6:56 AM. The contact information section lists an email address (copelandb@umsystem.edu), a chat address (bcz2k@umsystem.edu), a work phone number (000-000-0000), and a job title (E-BUILDER ADMINISTRATOR). A red box highlights the chat address, and a red arrow points from a text box to it.

Copeland, Bill
+ Pronouns E-BUILDER ADMINISTRATOR • Facilities Planning and Dev
Update your profile

Overview **Contact** Organization Files Messages LinkedIn

Available • Free on 6/24
Work hours: 7:00 AM - 4:00 PM
6:56 AM - Your local time

Contact information

Email copelandb@umsystem.edu	Chat bcz2k@umsystem.edu	Work phone 000-000-0000
Company University of Missouri	Job title E-BUILDER ADMINISTRATOR	Department Facilities Planning and Dev

Copy Chat address to ensure you have the correct Username required for SSO.

Add New User (Step 1) |

In eBuilder, click on the global **Setup** tab and navigate to **Users** then **Manage Users**.

Navigate and confirm they are not already in eBuilder:

The screenshot shows the eBuilder interface. At the top, the 'Setup' tab is selected in the navigation menu. On the left sidebar, under the 'Administrative' section, the 'Users' option is highlighted with a red box and a red '2'. The main content area is titled 'Setup' and contains the text: 'Select a setup option from the menu on the left side of the screen.'

This will display a list of existing users and give you access to the features to Add and Manage User Accounts. As a best practice, search on the user's name you need to add, to ensure they don't already exist by using the **Filter** feature:

The screenshot shows the 'Users' page. The 'Filter Users' section has the 'Last Name' field highlighted with a red box and a red '1', with a red arrow pointing to it and the text 'Enter last name.'. The 'Filter' button is highlighted with a red box and a red '2', with a red arrow pointing to it and the text 'Click Filter'.

	Name	User Name	Company Name	Date Added	Last Login	Access Expires	License Expires
<input type="checkbox"/>	Den Abitz	dabitz@gosteam.com	GEORGE BUTLER ASSOCIATES, INC.	04.01.2020	07.01.2022		N/A
<input type="checkbox"/>	Jaime Abshier	jwilson@rossbar.com	ROSS & BARUZZINI, INC.	01.06.2021	09.08.2022		N/A
<input type="checkbox"/>	Kacie Abt	kacia@blex.com	BLOOMSDALE EXCAVATING CO., INC.	08.04.2023	06.20.2024		N/A
<input type="checkbox"/>	Bid.Svc Account (Do Not Delete)	Bia.SvcAccount	University of Missouri System	07.26.2023	10.28.2023		N/A
<input type="checkbox"/>	Contractor Accountant	ContractorAccountant	FPD	02.28.2020	04.06.2021		N/A
<input type="checkbox"/>	Annie Accounting	AnnieAccounting	FPD	04.01.2019	02.20.2024		N/A
<input type="checkbox"/>	Patternn Ives Accounting	accounting@patternn-ives.com	Patternn Ives LLC	03.14.2023			N/A
<input type="checkbox"/>	Amanda Accounting BSS	AccountingBSS_UAT	UAT Testing	01.15.2019	04.11.2019	04.02.2021	N/A
<input type="checkbox"/>	Kathy Achelpohl	kathy.achelpohl@pgav.com	PECKHAM GUYTON ALBERS AND VEITS INCORPORATED	06.30.2021			N/A
<input type="checkbox"/>	Jim Achurch	jachurch@vanstarconstruction.com	Vanstar Construction Company	05.21.2020	09.29.2020	07.07.2021	N/A

Users

Filter Users

First Name	<input type="text"/>	Last Name	<input type="text" value="Bassett"/>
Username	<input type="text"/>	Company	<input type="text"/>
Role	<input type="text"/>	License Type	<input type="text"/>

Users

<input type="checkbox"/>	Name	User Name	Company Name	Date Added	Last Login	Access Expires	License Expires
There are no users that meet your filter criteria.							

Click on Add to get started.

3

Add

If your search results return the following message circled in red above, you can proceed on adding the new user. Click on **Add** to get started. If the results produce a user account, we need to determine if this is a duplicate or an existing account take the appropriate steps to update.

Enter the following information to Add New User:

Add New User

Notify user that he/she has been added

Member Profile

* First Name	<input type="text"/>	* Company	<input type="text"/>
* Last Name	<input type="text"/>	* Email Address	<input type="text"/>
* Username	<input type="text" value="Ex: Username@UMSvsystem.edu"/>	Access Expires	<input type="text"/>

* License Type Contracted License Require Single Sign On

Business Information

+ Type of Business	--Please Select a Type--	Title	<input type="text"/>
Department	<input type="text"/>	+ Business Address	<input type="text"/>
P.O. Box/Suite	<input type="text"/>	+ City	<input type="text"/>
+ State/Province	-- States --	Country	<input type="text"/>
+ Postal/Zip Code	<input type="text"/>	+ Office Phone	<input type="text"/>
Office Fax	<input type="text"/>	Business Cell Phone	<input type="text"/>
Business Pager	<input type="text"/>		

+ Users will be required to complete these fields when logging in.

Custom Fields

All Project Access:	<input type="text" value="Please select..."/>
---------------------	---

Notify user that he/she has been added

4

Enter required information

5

SSO is required for University Employees only.

6

While not required complete as much as possible.

7

Set to user's campus

8

Username cannot be modified after the user is saved.

Do not use due to SSO issues

Click on Save or Cancel to disregard.

Add Account Level Roles (Step 2) |

Now that the new user has been added to eBuilder, you need to add them to the appropriate Account Level roles. Navigate to the user you just created under **Setup \ Users \ Manage Users** and click on **Manage Membership**. The following dialog box will appear:

Reference - profiles for Membership Roles at the end of this document.

Use Account Level Roles sparingly to reduce confusion on who has responsibility and notifications. Best practice is to add roles such as PM and CPMs at the project level and Agreement/Contract Admins at the account level.

Add to Campus Projects \ Project Template (Step 3) |

The newly created user needs to be added to all campus project, which will also add them to project template. The project template (which is a project) will ensure that they are added to all new projects as a participant - which will give them view access. This project template is applied to all new projects during the creation of the project.

Navigate to the user you just created under **Setup \ Users \ Manage Users** and click on **Manage Membership**. Select all the projects on the left and with the arrow in the center, move them to the right. Click Save once completed, or cancel

The screenshot displays the 'Manage Membership' interface. At the top, a navigation bar includes 'Projects' (highlighted with a red box and circled '1'), 'Account Roles', 'Project Roles', 'Role Templates', and 'Manage Bill Rates'. The main area is split into two panes: 'All Projects' on the left and 'Projects That User Is A Member Of' on the right. The 'All Projects' list includes items like '#9 Bellerive Maintenance Updates', '#9 Bellerive minor repairs', and various 'Template' entries. A red box and circled '2' highlight this list. A yellow highlight on the list contains the text: 'The project list will be based on what projects'. Between the panes are two arrows (right and left) with a circled '3' pointing to them. A red text box explains: 'Select all projects on the left and click on the arrow to add to the right or reverse to remove projects.' At the bottom left, a red box and circled '4' highlight two checkboxes: 'Notify user added/removed to/from project(s)' and 'Include login info'. A red text box below explains: 'Due to SSO issues - Only use for Consultants and Contractors'. At the bottom right, a red box and circled '4' highlight 'Save' and 'Cancel' buttons. A red text box below explains: 'Click on Save or Cancel to disregard.'

Due to SSO issues - Only use for Consultants and Contractors

Click on **Save** or **Cancel** to disregard.

Add to Project Level Roles (Step 4) |

The newly created user needs to be in the appropriate **Project Level Roles** for the projects they are actively a participant on. There are two different ways to manage Project Level Roles: **Option 1** – Mangle project level roles in the user’s account, or **Option 2** – Mangle project level roles at the project.

Option 1 – Mangle the project level roles in the user’s account: If you are not in the user's account, you will need to navigate to the user you just created under **Setup \ Users \ Manage Users ** click on **Manage Membership** click on **Project Roles** tab:

The screenshot shows a web interface for managing project roles. At the top, there is a navigation bar with tabs: "Projects", "Account Roles", "Project Roles" (highlighted with a red box and circled "1"), "Role Templates", and "Manage Bill Rates". Below the navigation bar are "Save" and "Cancel" buttons. The main area is divided into two columns. The left column is titled "All Projects" and contains a list of projects: "*New Project Requests", "*Template - MU", "MU Research Reactor - Lab Building Expansion Study", and "University Hall Renovate 225" (highlighted with a red box and circled "3"). The right column is titled "Selected Projects" and contains a list: "1 - Agreement Administrator" and "University Hall Renovate 225". Between the two columns are two arrows: a right-pointing arrow (circled "4") and a left-pointing arrow. A red callout box with circled "2" points to a dropdown menu in the top left of the main area, which is currently set to "1 - Agreement Administrator". A red callout box with circled "5" points to the "Save" and "Cancel" buttons at the bottom right of the main area.

Select the Project Level Role you want to add them to.

Select the project(s) on the **left** that you want to add the user in the role to click on the arrow to add to the **right** or reverse to remove roles.

Click on **Save** or **Cancel** to disregard.

Option 2 – Manage project level roles at the project: Navigate to the project you need to manage the user’s project level roles in. With In the project under the lefthand **Project Menu \ Details ** click on **Project Participants ** under Roles click on the role you need to add them to:

The screenshot shows the e-Builder interface for managing project participants. The top navigation bar includes 'My Home', 'Dashboard', 'Projects', 'Processes', 'Documents', 'Contacts', 'Bidding', 'Cost', 'Schedule', 'Reports', 'Setup', and a search icon. The 'Projects' menu is active, showing a dropdown for 'CP232931 - University Hall Renovate 225 - Crocker, Jessica' (annotated with a red circle and '1 Find the project.'). On the left, the 'Project Menu' is expanded to 'Project Participants' (annotated with a red circle and '2'). Under 'Project Participants', the 'Roles' section is expanded to '1 - Agreement Administrator' (annotated with a red circle and '3'). In the 'Roles' list, '1 - Agreement Administrator' is selected (annotated with a red circle and '4 Select the role.'). The main area shows a form for adding users to the selected role, with fields for First Name, Last Name, Username, and Company. Below the form is a table of existing users:

Name	User Name	Company Name	Account Role	Project Role
Kaylin Lynch	kldgm@umsystem.edu	University of Missouri - Columbia	✓	✓
Tracy Reddick	reddickt@umsystem.edu	University of Missouri - Columbia	✓	

Buttons for 'Send Message', 'Add User', and 'Remove User' are visible for each user row. The 'Add User' button in the second row is highlighted with a red circle and '5'.

The screenshot shows the 'Add User To 1 - Agreement Administrator' page. It features a 'Filter Users' section with input fields for First Name, Last Name, Username, and Company, and a 'Filter' button (annotated with a red circle and '6'). Below the filter is a table of users:

Users	User Name	Company Name	Date Added
<input type="checkbox"/> UM System Administrator	eb@UniversityofMissouriSystem	UM System	09.18.2018
<input type="checkbox"/> Elizabeth Amirahmadi	elizabeth@i-a-a.com	INTERNATIONAL ARCHITECTS ATELIER INCORPORATED	03.02.2020
<input type="checkbox"/> Majid Amirahmadi	majid@i-a-a.com	INTERNATIONAL ARCHITECTS ATELIER INCORPORATED	03.02.2020
<input type="checkbox"/> Beth Asbury	asburyb@umsystem.edu	University of Missouri System	10.01.2018
<input type="checkbox"/> Chuck Bouse	bousec@umsystem.edu	University of Missouri System	10.01.2018

An 'Add User' button is highlighted with a red box and a red arrow pointing to it from the text 'Select User(s) and click Add User.'.

Note: You cannot manage Account Level Roles at the project.

Add Companies and Contacts – Navigation Overview |

In eBuilder, we add and manage Companies and Contacts from the global tab **Contacts**. When adding a new Company, you first are required to ensure they have been set up in People Soft. When adding a new company, the Company Number (equivalent to the PS Account Number) is a required field and is generated by Shared Service Accounting.

Navigation Overview:

You can manage either Contacts or Companies

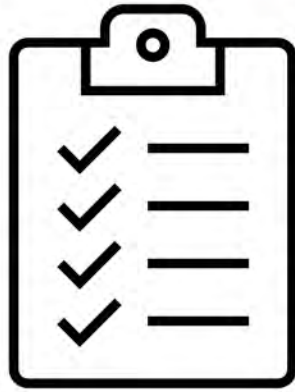
Lookup button will switch based on the subtab you are on and allow you to search.

Allows you to add new Companies or Contacts

Company Name *	First Name	Last Name	Email	Phone
DO NOT USE G&W Engineering **DO NOT USE**	Chuck	Voltz	cvoltz@gandwengineering.com	
DO NOT USE G&W Engineering **DO NOT USE**	Joe	Dressler	Jdressler@gandwengineering.com	
DO NOT USE G&W Engineering **DO NOT USE**	Mike	Lundry	MLundry@gandwengineering.com	
DO NOT USE G&W Engineering **DO NOT USE**	Jeanne	Walk	Jwalk@gandwengineering.com	
DO NOT USE G&W Engineering **DO NOT USE**	Terry	McCreary	Tmccreary@gandwengineering.com	
DO NOT USE G&W Engineering **DO NOT USE**	Charles	Voltz	Cvoltz@gandwengineering.com	
PARAGON ARCHITECTURE, LLCDO NOT USE**	Jared	Younglove	younglove@paragon-architecture.com	(417) 885-0002 x1003
PARAGON ARCHITECTURE, LLCDO NOT USE**	Brad	Erwin	erwin@paragonarchitecture.com	
*Sample Company	ZP	GC	zpradhan@e-builder.net	954-678-9202
*Sample Company	Adriana	Lopez	alopez@e-builder.net	(210) 501-5555
*ZP Enterprise test	Zack	Test	zaheer.pradhan@cloud.com	
*ZP Inc TEST	Zack	Prad	zpradhan@e-builder.net	
0100116024	Jeff	Hood	jeff@tshinc.com	314/661-1111

Note: Recommend adding and managing Contacts through the Companies Tab

New Company/Contact Setup – Check List:



Prework:

- Verify Company doesn't exist in eBuilder
- Verify the new Company has been set up in People Soft
- Have Company I-9 (dba name and information)

1. Add new Company
2. Add new Contacts
3. Convert Contact to a User
4. Add User (contact) to Roles and Projects

Add New Company (Step 1) |

In eBuilder, navigate to the Global Tab **Contacts**. Click on the sub tab **Companies**. Click on Add Company in the upper right corner.

The screenshot shows the 'Add Company' form in the e-Builder application. The form is titled 'Add Company' and is part of the 'Contacts' tab. It contains several sections: 'Company Information', 'Custom Fields (2)', and 'Notes'. The 'Company Information' section includes fields for Company Name, Country, Address, Suite, City, State/Province, County, and Zip/Postal Code. The 'Custom Fields (2)' section includes fields for Federal Identification Number and PS Vendor Name. The 'Notes' section is empty. The form also has a 'Generate' button next to the Company Number field and a 'Save' button at the bottom. Annotations with red boxes and numbers 1 through 4 point to specific fields and buttons. A yellow note on the right side of the form reads: 'Note: Do not use the Generate button.'

1 Add Company information from their completed I-9. Must be their legal dba company name.

2 Add Company Number from People Soft

3 Add additional detail as needed.

4 Click on **Save** or **Cancel** to disregard.

Note: Do not use the Generate button.

Add New Contacts (Step 2) |

In eBuilder, navigate to the Company you need to add a contact.

e-Builder My Home Dashboard Projects Processes Documents **Contacts** Bidding Cost Schedule Reports Setup

Companies | Contacts | Import Contacts

Company Details

Company Information Add Company **Add Contact** Message History Edit Delete

Company:	CLARK & ENERSEN, INC.	Company Number:	0100017795
Country:	USA	Phone:	(816) 474-8237
(view map) Address:	1010 Lincoln Mall	Fax:	
Suite:	200	Website URL:	
City:	Lincoln	Classifications:	
County:	Lancaster	Is Prequalified?:	
State/Province:	NE	Do Not Use?:	
Zip/Postal Code:	68508-2883	Active:	<input checked="" type="checkbox"/>
Primary Contact:	Stull, Roger		

Click on the **Contacts** subtab.

1

Verify the Contact doesn't already exist.

2

3
Click on **Add Contact**.

Custom Fields (2)	Contacts (15)	Notes (0)	Commitments (44)	Actual Costs (247)	Bidding (0)	Construction Codes (0)	Documents (0)	Forms (0)	Processes (0)
Projects (37)	Master Commitments (0)	Master Invoices (0)							

Name	Email	Phone	Fax	Primary
Adams, Brent	brent.adams@clarkenersen.com	(816) 474-8237		
Beecher, James	jbeecher@clarkenersen.com	(816) 474-8237		
Bullington, Joy	joy.bullington@clarkenersen.com	(816) 474-8237		
Clay, Matt	Matt.clay@clarkenersen.com	(816) 474-8237		
Lattig, Greg	greg.lattig@clarkenersen.com	(816) 474-8237		
Mahoney, Jamie	Jmahoney@clarkenersen.com	(816) 474-8237		

Export

Add Contact

Contact Information

4

Complete required fields

* First Name:	Prefix <input type="text"/>
* Last Name:	<input type="text"/>
* Company:	CLARK & ENERSEN, INC.
Company Number:	0100017795
Country:	United States
Address:	1010 Lincoln Mall
Suite:	200
City:	Lincoln
State/Province:	Nebraska
Zip/Postal Code:	68508-2883

Add any additional details you may have

5

Primary Contact?:	<input type="checkbox"/> Yes
Email:	<input type="text"/>
Department:	<input type="text"/>
Title:	<input type="text"/>
Phone:	(816) 474-8237
Mobile Phone:	<input type="text"/>
Other Phone:	<input type="text"/>
Fax:	<input type="text"/>
Pager:	<input type="text"/>
Do Not Use?:	<input type="checkbox"/>

Custom Fields (0)

Notes

There are no custom fields for this contact.

6

Save and Add

Save

Cancel

Click on **Save** or **Cancel** to disregard.

Convert Contact to a User (Step 4)

Now that you have added a contact to a company, you will need to convert that Contact to a User if they are to work on the project and require access to eBuilder. Navigate to the **Contact Details** of the **Contact** that you want to convert to an eBuilder User:

Contact Details

[Companies](#) | [Contacts](#) | [Import Contacts](#)

Click on the **Create User** button. If this is not displayed, that means the user is already created.

Contact Information

1

Create User

Message History

Edit

Copy

Delete

Print

Name:	John Doe	Primary Contact?:	No
Company:	CLARK & ENERSEN, INC.	Email:	
Company Number:	0100017795	Title:	
Department:		Phone:	(816) 474-8237
Country:	United States	Mobile Phone:	
(view map) Address:	1010 Lincoln Mall	Other Phone:	
Suite:	200	Fax:	
City:	Lincoln	Pager:	
State/Province:	Nebraska	Username:	[Edit]
Zip/Postal Code:	68508-2883	Do Not Use?:	

Custom Fields (0)

Notes (0)

Bidding (0)

Construction Codes (0)

Documents (0)

Forms (0)

Processes (0)

Projects (0)

There are no custom fields for this contact.

Add New User

Complete required fields.
User their work email
address for **Username**.

Member Profile Notify user that he/she has been added **Save** **Cancel**

* First Name	John	* Company	CLARK & ENERSEN, INC.
* Last Name	Doe	* Email Address	
* Username		Access Expires	
* License Type Contracted License		Hide in Global Directory	<input type="checkbox"/>
* Login Authentication	<input type="radio"/> Require Single Sign-On <input checked="" type="radio"/> None	Add any additional details you may have	

2

3

Leave default setting to **None**.

4

Business Information

+ Type of Business	--Please Select a Type--	Title	
Department		+ Business Address	1010 Lincoln Mall
P.O. Box/Suite	200	+ City	Lincoln
+ State/Province	Nebraska	Country	USA
+ Postal/Zip Code	68508-28	+ Office Phone	(816) 474-8237
Office Fax		Business Cell Phone	
Business Pager			

+ Users will be required to complete these fields when logging in.

Custom Fields

All Project Access:	Please select...	<input type="checkbox"/> Notify user that he/she has been added	Save Cancel
---------------------	------------------	---	---------------------------

Leave default setting to **Please Select...**

Check Box to notify they have been added.

5

6

7

Click on **Save** or **Cancel** to disregard.

Add User (contact) to Roles and Projects (Step 5)

Now that you have converted the **Contact** to a **User**, they need to be given the necessary **Account Level** and **Project Level Roles** and be added to the appropriate projects. You provide roles to external users just as you do for internal staff.

Account Level Roles:

Navigate to the **Setup \ Users \ Manage Users** and find the user you need to add/change Account Level Roles\click on **Manage Membership** button:

Membership For Matt Clay

The screenshot displays the 'Membership For Matt Clay' interface. At the top, there are navigation tabs: 'Projects', 'Account Roles' (highlighted with a red box and a circled '1'), 'Roles', 'Role Templates', and 'Manage Bill Rates'. On the right side, there are 'Save' and 'Cancel' buttons.

The main area is divided into two panes. The left pane, titled 'All Roles', contains a list of roles. A red box highlights this list, and a circled '2' points to it. The right pane, titled 'Roles That User Is A Member Of', contains a list of roles currently assigned to the user. A red box highlights this list, and a circled '3' points to it.

Between the panes, there are two arrows: a right-pointing arrow and a left-pointing arrow. A red box highlights these arrows, and a circled '2' points to them. A red text box with arrows pointing to the arrows contains the following text: 'Select appropriate roles on the left and click on the arrow to add to the right or reverse to remove roles.'

Below the right pane, there is a yellow highlighted text box that reads: 'All external users require these Account Level Roles:'. Below this text box is a bulleted list of roles: '99 - Access External - (appropriate role)' and 'Member'. A red box highlights this list, and a circled '3' points to it.

At the bottom right, there are 'Save' and 'Cancel' buttons. A red box highlights these buttons, and a circled '3' points to them. A red text box with an arrow pointing to the buttons contains the following text: 'Click on Save or Cancel to disregard.'

Project Assignment:

After the external user has been added to **Account Level Roles**, you need to add them to **Projects** and any **Project Level Roles**, if needed. On the **Manage Membership** screen of the user, click on the **Projects** tab:

Membership For Matt Clay

1

Projects Account Roles Project Roles Role Templates Manage Bill Rates

All Projects

- #9 Bellerive Maintenance Updates
- #9 Bellerive minor repairs
- #9 Bellerive Roof Replacement
- #9 Bellerive Solarium & Tuckpointing Repairs
- *** Account Level Cost Attachments ***
- *** Implementation - University of Missouri System
- *** PeopleSoft Integration Project
- *** Standards Library
- *** UAT - User Acceptance Testing
- *Admin - Import Exceptions Test
- *Avicardo Construction Technology Services
- *New Project Requests
- *Template - MU
- *Template - MUHC
- *Template - S&T
- *Template - UMKC

2

Select the project(s) on the left that you want to add the user in the role to click on the arrow to add to the right or reverse to remove roles.

Projects That User Is A Member Of

- Hy Point South Renovation

3

Notify user added/removed to/from project(s)

Include login info

4

Save Cancel

Check this box if you want eBuilder to automatically notify the user.

Click on **Save** or **Cancel** to disregard.

Project Level Roles:

After adding the user to appropriate Account Level Roles and Project(s), you can now add their project level roles. If you are not in the user's account, you will need to navigate to the user under **Setup \ Users \ Manage Users** \ click on **Manage Membership** \ click on **Project Roles** tab:

The screenshot shows a software interface for managing project roles. At the top, there is a navigation bar with tabs: "Projects", "Account Roles", "Project Roles" (highlighted with a red box and a circled "1"), "Role Templates", and "Manage Bill Rates". Below the navigation bar are "Save" and "Cancel" buttons. The main area is divided into two panes. The left pane, titled "All Projects", contains a list of projects: "*New Project Requests", "*Template - MU", "MU Research Reactor - Lab Building Expansion Study", and "University Hall Renovate 225" (highlighted with a red box and a circled "3"). The right pane, titled "Selected Projects", contains a list with "1 - Agreement Administrator" and "University Hall Renovate 225". Between the panes are two arrow buttons: a right-pointing arrow (circled "4") and a left-pointing arrow. A red callout box with a circled "2" points to a dropdown menu labeled "Roles" which has "1 - Agreement Administrator" selected. A red callout box with a circled "5" points to the "Save" and "Cancel" buttons at the bottom right of the interface.

Select the Project Level Role you want to add them to.

Select the project(s) on the **left** that you want to add the user in the role to click on the arrow to add to the **right** or reverse to remove roles.

Click on **Save** or **Cancel** to disregard.

References|

Following are reference information that includes profiles for Account Level and Project Level Role assignments and further down below, the eBuilder roles required to be actors in workflow:

Project Manager	
Account Level Roles	Project Level Roles
1 – NPR	1 – Project Manager
1 – Schedule Manager User	
9 – Access Edit - Internal User	
Member	

Construction Project Manager	
Account Level Roles	Project Level Roles
1 – Schedule Manager User	1 – Construction Project Manager (CPM)
99 – Access Edit - Internal User	
Member	

Agreement Administrator	
Account Level Roles	Project Level Roles
0 – Manage Membership	
1 – Agreement Administrator	
1 -NPR	
99 – Access Edit - Internal User	
Member	

Contract Administrator	
Account Level Roles	Project Level Roles
1 – Contract	
99 – Access Edit - Internal User	
Member	

Accounting	
Account Level Roles	Project Level Roles
1 – Accounting/BSS	
99 – Access Edit - Internal User	
Member	

Unknown	
Account Level Roles	Project Level Roles
99 – Access Edit - Internal User	
Member	

Note: You can add roles at a later time.

Contract Administrator	
Account Level Roles	Project Level Roles
1 – Contract	
99 – Access Edit - Internal User	
Member	

Contract Administrator	
Account Level Roles	Project Level Roles
1 – Contract	
99 – Access Edit - Internal User	
Member	

Internal Roles Required for eBuilder Processes

Processes	Internal Roles Required for eBuilder Processes																													
	1 - Accounting/BSS	1 - Agreement Administrator	1 - Campus Fiscal Officer	1 - Change Order Approver	1 - Closeout QC	1 - Construction Director	1 - Construction Manager	1 - Construction Project Manager	1 - Contract Administrator (MU)	1 - Contracting Officer - Campus	1 - CS Manual Review	1 - Design Staff	1 - Director	1 - Interior Design	1 - Manager	1 - Manager Design Services	1 - Project Assigner MU	1 - Project Coordinator	1 - Project Manager											
01.00 - New Project Request *			R															R		R										
01.10 - Project Status and Details Update *								R												R										
10.00 - Project Authorization (Budget Est.)	I			R		I		I	I				I	R						I	R									
10.05 - Project Budget Re-Allocation/Change	I	R		R		I		I	I				I	R							I	R								
10.20 - Work Authorizations	I	R				I		I	R	I	R	R			I	R						I								
10.50 - Schedule of Values	I	R		R		I		I	R	I				I																
20.10 - Standard Consultant Agreement		R	I	R				I	I		R			I	R							I								
20.30 - General Consultant Agreement		R	I	R				I	I	R	R			I	R							I								
20.50 - Geotechnical Engineer Agreement		R	I	R				I	I	R	R			I	R							I								
20.60 - Land Surveyor Agreement		R	I	R				I	I	R	R			I	R							I								
30.10 - DBB Construction Approval (DBB)		R				I		I		R	R			I	R							I								
30.15 - Change Order/Amendment Request		R	I	R	R	R		I	R	I	R	R	R		R							I	R							
30.20 - DB Contract		R	I				I	I	R	I	I	R	R		I	R							I							
30.30 - CMR Commitment Approval		R	I					I	R		I				R								I							
30.40 - MCA Work Authorization		R		R			I	R	I		I	R	R		I	R							I							
30.80 - Notice to Proceed *										R	I	R																		
40.10 - Planning Phase Review							I						I	I	I								I	R						
40.20 - Schematic Design Review													I											I	R					
40.30 - Design Development Review													I												I	R				
40.35 - %Construction Document Review													I													I	R			
40.40 - Construction Document Review													I														I	R		
50.10 - Request for Information									I					I														I		
50.20 - Architectural Supplement Instruction									R				I																	
60.05 - Substantial Completion Acceptance Process							I	R		I	R	I	R	I		I	R												I	
60.10 - Project Closeout																													R	
60.20 - Project Closeout - Consultant (Spawned)							R							R															R	
60.30 - Project Closeout - Contractor (Spawned)							R																						R	
70.00 - Invoice Approval	I	R	R	R			R		I	R	I																		I	R

* All users of UM System can initiate this process

External Roles Required for eBuilder Processes:

I = Initiate
R = Required

Processes	2 - Agreement Execution	2 - Campus Stakeholder	2 - Client	2 - Client Fiscal Officer	2 - CM as Constructors	2 - Code Consultant	2 - Consultant Accountant	2 - Consultant Admin	2 - Contractor Accountant	2 - Contract Execution	2 - Department Leader	2 - Design Consultant	2 - Design Team Member	2 - General Contractor	2 - MCA General Contractor	2 - Sub-Contractor	2 - Vendors	3 - Geotech Engineer
01.00 - New Project Request *																		
01.10 - Project Status and Details Update *																		
10.00 - Project Authorization (Budget Est.)			R	R								R						
10.05 - Project Budget Re-Allocation/Change			R	R								R						
10.20 - Work Authorizations	R									R								
10.50 - Schedule of Values					I									I			I	
20.10 - Standard Consultant Agreement	R																	
20.30 - General Consultant Agreement	R																	
20.50 - Geotechnical Engineer Agreement	R																	
20.60 - Land Surveyor Agreement	R																	
30.10 - DBB Construction Approval (DBB)										R								
30.15 - Change Order/Amendment Request	R									R								
30.20 - DB Contract										R								
30.30 - CMR Commitment Approval																		
30.40 - MCA Work Authorization										R								
30.80 - Notice to Proceed *										R								
40.10 - Planning Phase Review												I						
40.20 - Schematic Design Review																		
40.30 - Design Development Review																		
40.35 - %Construction Document Review																		
40.40 - Construction Document Review																		
50.10 - Request for Information												R		I	R			
50.20 - Architectural Supplement Instruction								I				I						
60.05 - Substantial Completion Acceptance Process																		
60.10 - Project Closeout																		
60.20 - Project Closeout - Consultant (Spawned)						R						R						
60.30 - Project Closeout - Contractor (Spawned)														R				
70.00 - Invoice Approval							I		I			I		I		I	I	