



## 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

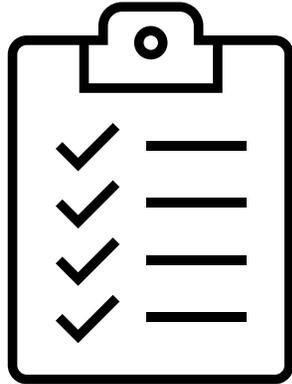
### Important Terms:

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 page for Bill Copeland. The profile includes a blue circular avatar with the initials 'CB' and a green checkmark. The name 'Copeland, Bill' is displayed, along with the job title 'E-BUILDER ADMINISTRATOR' and department 'Facilities Planning and Devl'. There is a '+ Pronouns' button and an 'Update your profile' button. Below the profile information are tabs for 'Overview', 'Contact', 'Organization', 'Files', 'Messages', and 'LinkedIn'. The 'Contact' tab is active, showing availability status 'Available - Free on 6/24' with work hours '7:00 AM - 4:00 PM' and a clock icon showing '6:56 AM - Your local time'. Under 'Contact information', there are three columns: 'Email' with 'copelandb@umsystem.edu', 'Chat' with 'bcz2k@umsystem.edu' (highlighted with a red box), and 'Work phone' with '000-000-0000'. Below these are 'Company' (University of Missouri), 'Job title' (E-BUILDER ADMINISTRATOR), and 'Department' (Facilities Planning and Devl). A red arrow points from the text 'Copy Chat address to ensure you have the correct Username required for SSO.' to the chat address box.

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. The top navigation bar includes 'My Home', 'Dashboard', 'Projects', 'Planning', 'Forms', 'Processes', 'Documents', 'Calendar', 'Contacts', 'Bidding', 'Cost', 'Schedule', 'Reports', 'Time Tracking', and 'Setup'. The 'Setup' tab is circled with a red '1'. On the left sidebar, under 'My Settings', there are options for Membership, Preferences, Schedule, Subscriptions, and Views. Under 'Administrative', 'Contacts' and 'Users' are listed, with 'Users' circled with a red '2'. Below 'Users', 'Manage Users' is highlighted with a red box. The main content area displays the 'Setup' page with a message: '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. At the top, there is a 'Filter Users' section with input fields for First Name, Username, Role, Last Name, Company, and License Type. The 'Last Name' field is circled with a red '1' and has a red arrow pointing to it with the text 'Enter last name.'. The 'Filter' button is circled with a red '2' and has a red arrow pointing to it with the text 'Click Filter'. Below the filter section is a table of existing users.

<input type="checkbox"/>	Name	User Name	Company Name	Date Added	Last Login	Access Expires	License Expires
Edit	Dan Abitz	dabitz@gbteam.com	GEORGE BUTLER ASSOCIATES, INC.	04.01.2020	07.01.2022		N/A
Edit	Jaime Abshier	jwilson@rossbar.com	ROSS & BARUZZINI, INC.	01.06.2021	09.08.2022		N/A
Edit	Kacie Abt	kacia@blex.com	BLOOMSDALE EXCAVATING CO., INC.	08.04.2023	06.20.2024		N/A
Edit	Bid.Svc Account (Do Not Delete)	Bid.SvcAccount	University of Missouri System	07.26.2023	10.28.2023		N/A
Edit	Contractor Accountant	ContractorAccountant	FPD	02.28.2020	04.08.2021		N/A
Edit	Annie Accounting	AnnieAccounting	FPD	04.01.2019	02.20.2024		N/A
Edit	Patterhn Ives Accounting	accounting@patterhn-ives.com	Patterhn Ives LLC	03.14.2023			N/A
Edit	Amanda Accounting BSS	AccountingBSS_UIAT	UIAT Testing	01.15.2019	04.11.2019	04.02.2021	N/A
Edit	Kathy Achelpohl	kathy.achelpohl@pgav.com	PECKHAM GUYTON ALBERS AND VEITS INCORPORATED	08.30.2021			N/A
Edit	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.							

Buttons: Add, Add existing, Copy, Email

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**

4 Enter required information

5 Require Single Sign On

6 While not required complete as much as possible.

7 Set to user's campus

8

Notify user that he/she has been added Save Cancel

SSO is required for University Employees only.

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.

1

Account Roles Project Roles Role Templates

Save Cancel

All Roles

- 0 - No Actor Role
- 1 - Accounting/BSS
- 1 - AHJ
- 1 - Campus Code Reviewer
- 1 - Campus Fiscal Officer
- 1 - Campus Fiscal Officer II
- 1 - CBO Permit Review
- 1 - Change Order Approver
- 1 - Closeout QC
- 1 - Construction Director
- 1 - Construction Manger
- 1 - Construction Project Manager (CPM)
- 1 - Contract - MU
- 1 - Contract Administrator
- 1 - Contracting Officer - Campus
- 1 - Contracting Officer - System
- 1 - CS Manual Review (MU)

2

Select appropriate roles on the left and click on the arrow to add to the right or reverse to remove roles.

Roles That User Is A Member Of

- 1 - Agreement Administrator
- 1 - NPR (MU)
- 99 - Access Edit - Internal User Member

3

Save Cancel

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

All internal users require these Account Level Roles:

- 99 - Access Edit - Internal Users
- Member

All external users require these Account Level Roles:

- Appropriate 99 - role
- Member role

**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 contains tabs: 'Projects' (highlighted with a red box and circled '1'), 'Account Roles', 'Project Roles', 'Role Templates', and 'Manage Bill Rates'. Below this, there are two main panels. The left panel, titled 'All Projects', contains a list of projects including '#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', and '\*Template - UIMKC'. A red box highlights the entire list, with a circled '2' pointing to it. Below the list are two checkboxes: 'Notify user added/removed to/from project(s)' and 'Include login info'. The right panel, titled 'Projects That User Is A Member Of', is currently empty. Between the two panels are two arrows: a right-pointing arrow (circled '3') and a left-pointing arrow. A red box highlights the right-pointing arrow, with a circled '4' next to it. A yellow highlight on the left panel contains the text: 'The project list will be based on what projects'. A red box highlights the 'Save' and 'Cancel' buttons at the bottom right, with a circled '4' next to it.

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 - UIMKC

2

3

4

Projects That User Is A Member Of

Select all projects on the left and click on the arrow to add to the right or reverse to remove projects.

The project list will be based on what projects

4

Save Cancel

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 application interface for managing project roles. At the top, there are navigation tabs: "Projects", "Account Roles", "Project Roles" (highlighted with a red box and a circled "1"), "Role Templates", and "Manage Bill Rates". Below the tabs, there 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 arrows: a right-pointing arrow (circled "4") and a left-pointing arrow (circled "4"). A red callout box with a circled "2" points to the "Roles" dropdown menu in the left pane, which currently shows "1 - Agreement Administrator". 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.

**Option 2** – Mange 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:

**1** Find the project.

**2** Project Menu

**3** Project Participants

**4** 1 - Agreement Administrator

**5** Add User

**6** Add User

**6** Add User

Select User(s) and click Add User.

Users	User Name	Company Name	Date Added
<input type="checkbox"/>	UM System Administrator	UM System	09.18.2018
<input type="checkbox"/>	Elizabeth Amirahmadi	INTERNATIONAL ARCHITECTS ATELIER INCORPORATED	03.02.2020
<input type="checkbox"/>	Majid Amirahmadi	INTERNATIONAL ARCHITECTS ATELIER INCORPORATED	03.02.2020
<input type="checkbox"/>	Beth Asbury	University of Missouri System	10.01.2018
<input type="checkbox"/>	Chuck Bouse	University of Missouri System	10.01.2018

**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**

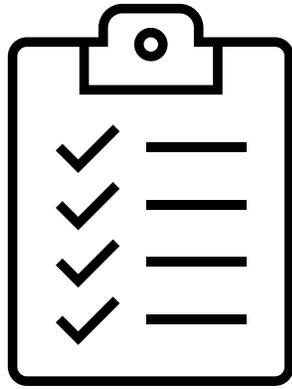
**Lookup button will switch based on the subtab you are on and allow you to search.**

**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, LLC**DO NOT USE**	Jared	Younglove	younglove@paragon-architecture.com	(417) 885-0002 x1003
**PARAGON ARCHITECTURE, LLC**DO 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@icloud.com	
*ZP Inc TEST	Zack	Prad	zpradhan@e-builder.net	
0100116034	Jeff	Hood	jehood@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.

**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.

## 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		

Recent Pages...

Click on the **Contacts** subtab.

Verify the Contact doesn't already exist.

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

* First Name:	Prefix <input type="text"/>	Primary Contact?: <input type="checkbox"/> Yes
* Last Name:	<input type="text"/>	5
* Company:	CLARK & ENERSEN, INC.	
Company Number:	0100017795	
Country:	United States	
Address:	1010 Lincoln Mall	
Suite:	200	
City:	Lincoln	
State/Province:	Nebraska	Email: <input type="text"/>
Zip/Postal Code:	68508-2883	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"/>

4

Complete required fields

Add any additional details you may have

5

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

2

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	

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

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

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 tabs for 'Projects', 'Account Roles', 'Roles', 'Role Templates', and 'Manage Bill Rates'. The 'Account Roles' tab is selected and highlighted with a red box and a circled '1'. Below the tabs, there are 'Save' and 'Cancel' buttons. The main area is divided into two panels. The left panel, titled 'All Roles', contains a list of roles such as '0 - eB Admin', '0 - Implementation Core Team Member', '0 - Manage Membership', '0 - No Actor Role', '0 - Reports', '1 - Accounting/BSS', '1 - Agreement Administrator', '1 - AHJ', '1 - Campus Code Reviewer', '1 - Campus Fiscal Officer', '1 - Campus Fiscal Officer II', '1 - CBO Permit Review', '1 - Change Order Approver', '1 - Closeout QC', '1 - Construction Director', and '1 - Construction Manager'. This list is enclosed in a red box. The right panel, titled 'Roles That User Is A Member Of', contains a list with one role: '99 - Access External Consultant Member', also enclosed in a red box. Between the two panels are two arrows: a right-pointing arrow and a left-pointing arrow. A red box with a circled '2' points to these arrows, with a red line connecting it to the 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 panel, there is a yellow highlighted text box that reads: 'All external users require these Account Level Roles:' followed by a bulleted list: '• 99 - Access External - (appropriate role)' and '• Member'. At the bottom right, there are 'Save' and 'Cancel' buttons, enclosed in a red box with a circled '3'. A red line connects this box to the 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

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

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.

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 are several tabs: "Projects", "Account Roles", "Project Roles", "Role Templates", and "Manage Bill Rates". The "Project Roles" tab is selected and highlighted with a red box and a red circle containing the number 1. Below the tabs, there 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 project names: "\*New Project Requests", "\*Template - MU", "MU Research Reactor - Lab Building Expansion Study", and "University Hall Renovate 225". The "University Hall Renovate 225" project is highlighted with a red box and a red circle containing the number 3. The right column is titled "Selected Projects" and contains a list of selected roles: "1 - Agreement Administrator" and "University Hall Renovate 225". A red box and a red circle containing the number 2 point to the "Roles" dropdown menu in the left column, which currently shows "1 - Agreement Administrator". A red box and a red circle containing the number 4 point to the right-pointing arrow button between the two columns. At the bottom right, there are "Save" and "Cancel" buttons, with a red box and a red circle containing the number 5 pointing to them. Red text annotations provide instructions for each step.

1

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

3

4

5

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		
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		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	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	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									I	R												R
60.20 - Project Closeout - Consultant (Spawned)						R				R			R									R
60.30 - Project Closeout - Contractor (Spawned)						R				R	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										R								
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	