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

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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

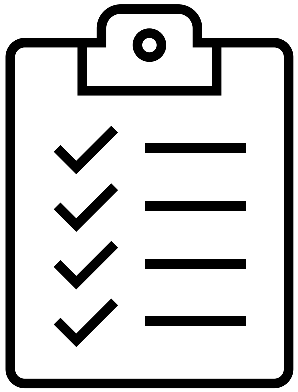
Important Terms:

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:

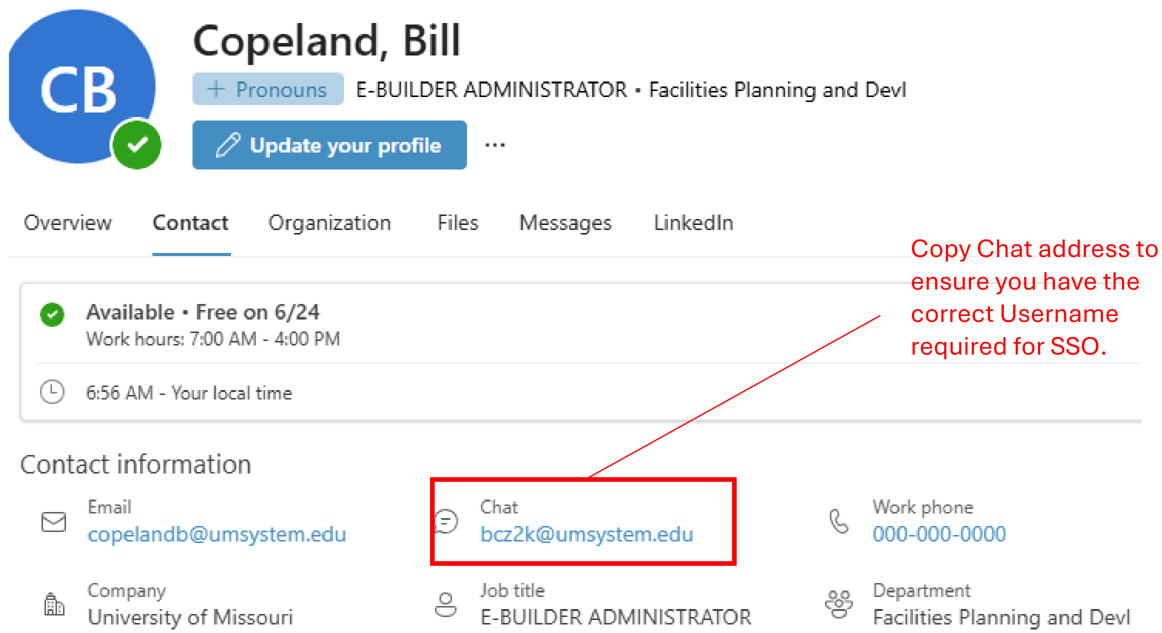
- User Accounts can include both Internal and External Users of eBuilder
- UM System Single-Sign-On (SSO) requires **username@UMSystem.edu** email for User ID
- Roles that start with 0 – admin roles, 1 – internal roles, and 2 – external roles
- Permissions are granted to users through roles
- New vendors 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

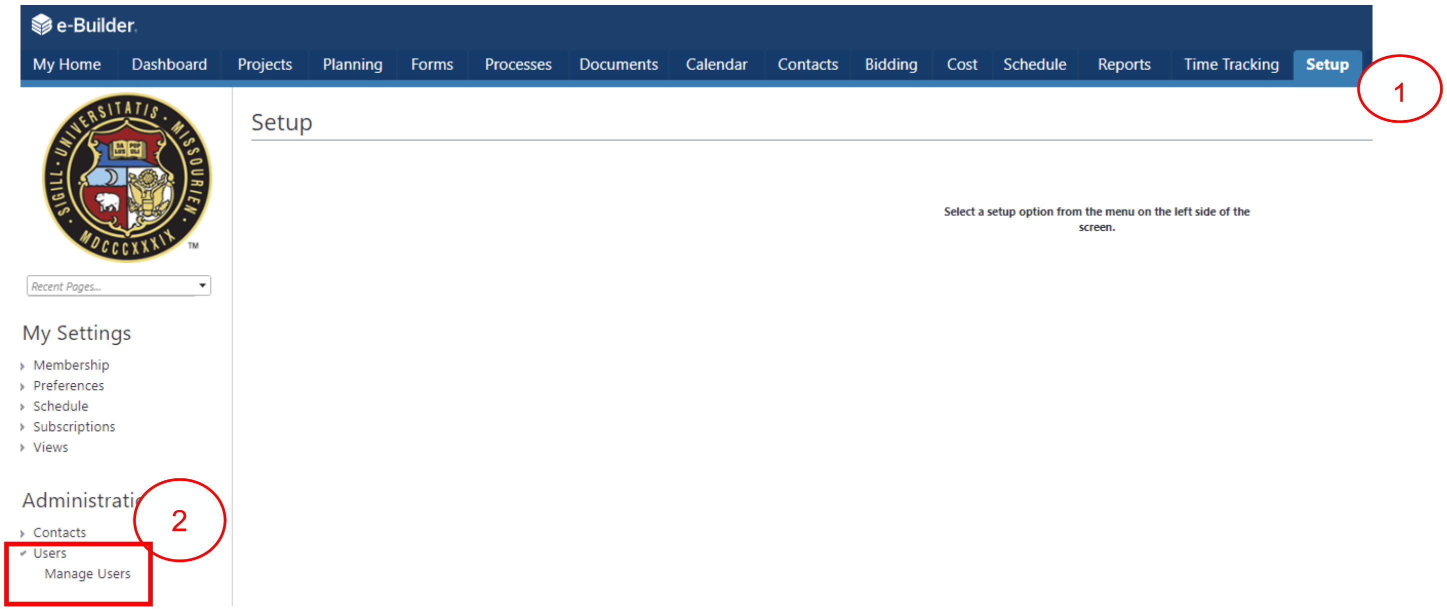
Tip: Use Email and Chat addresses and other useful information from Outlook.



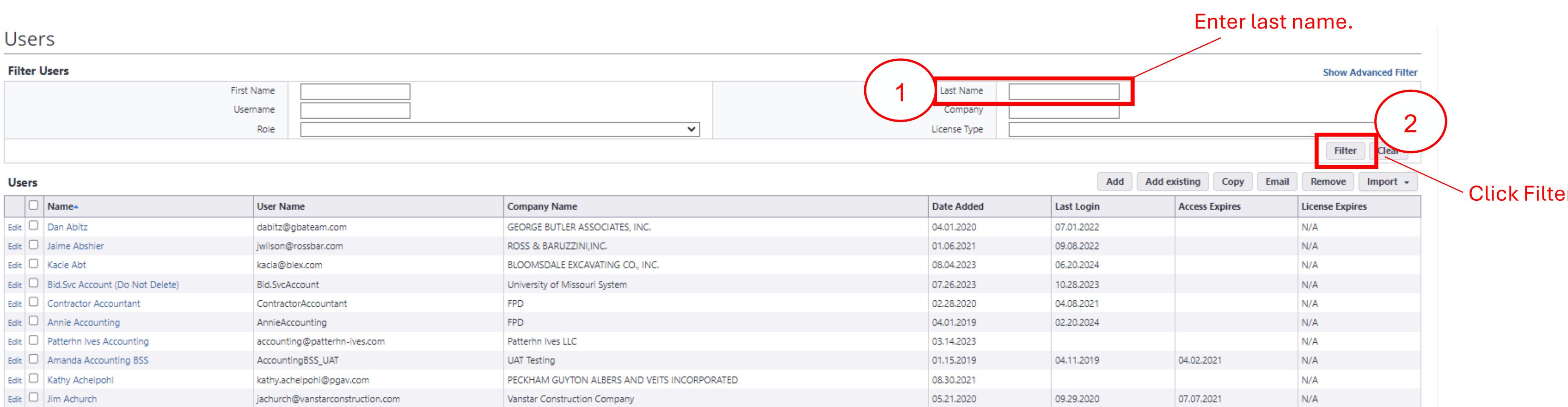
Add New User (Step 1) |

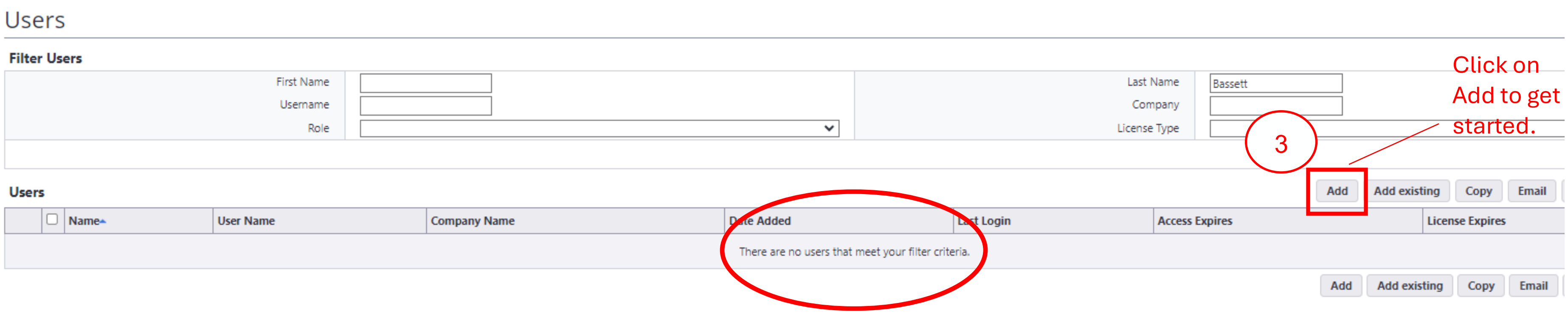
In eBuilder, click on the global **Setup** tab and navigate to **Users** then **Manage Users.**

Navigate and confirm they are not already in eBuilder:



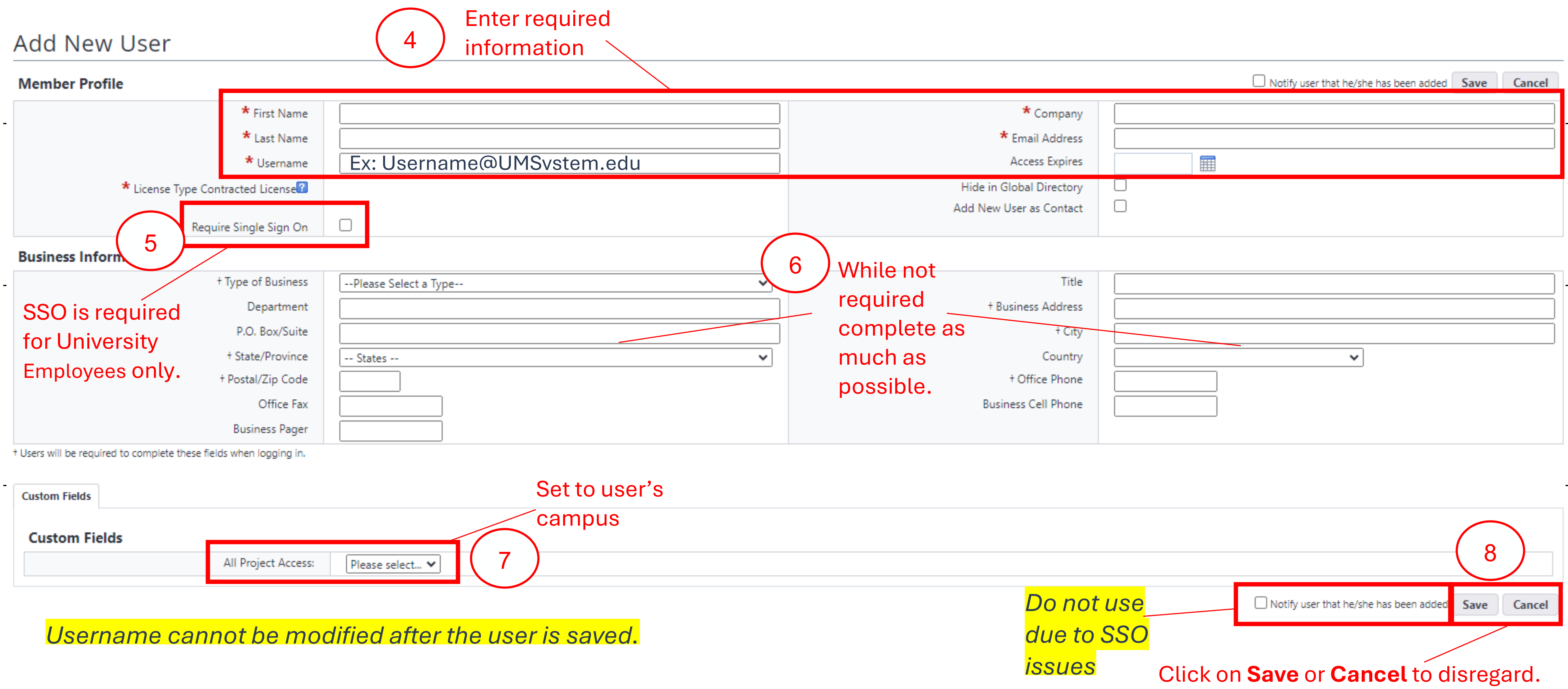
This will display a list of existing users and give you access to the features to Add and Manage User Accounts. As a best practice, search on the user's name you need to add, to ensure they don't already exist by using the **Filter** feature:





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.

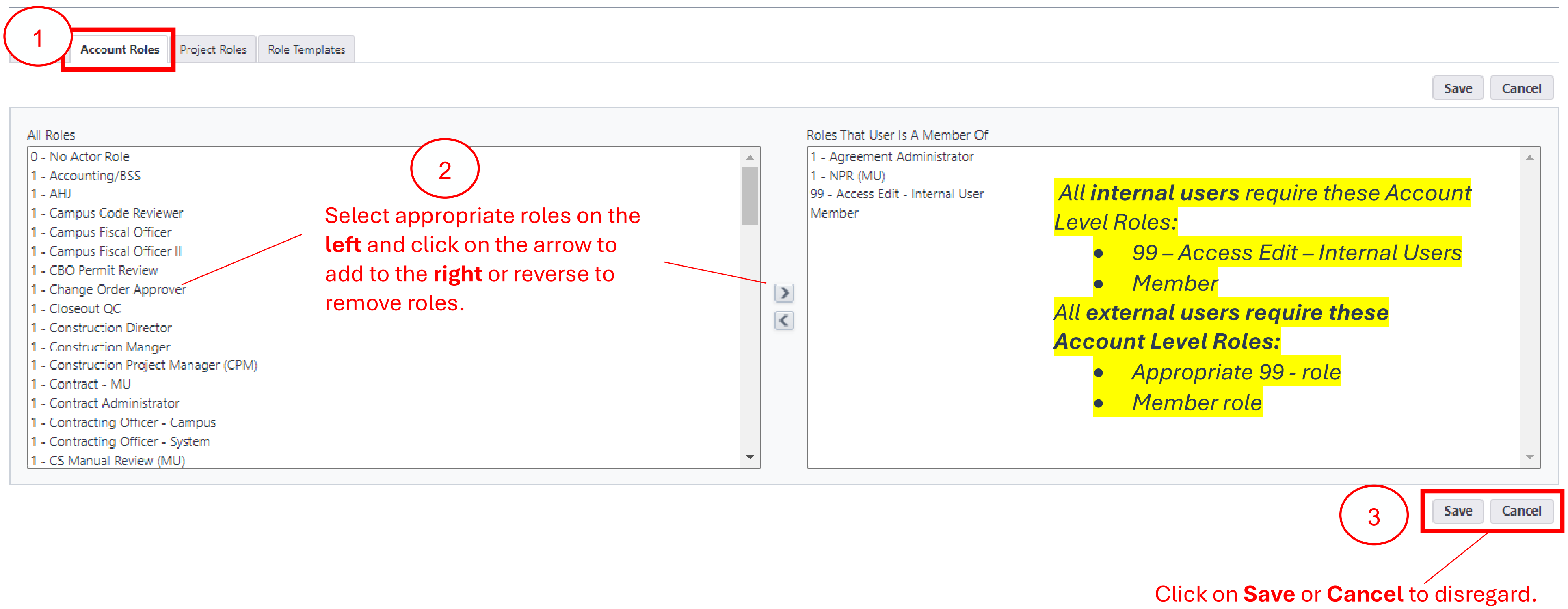
Enter the following information to Add New User:



Add 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.

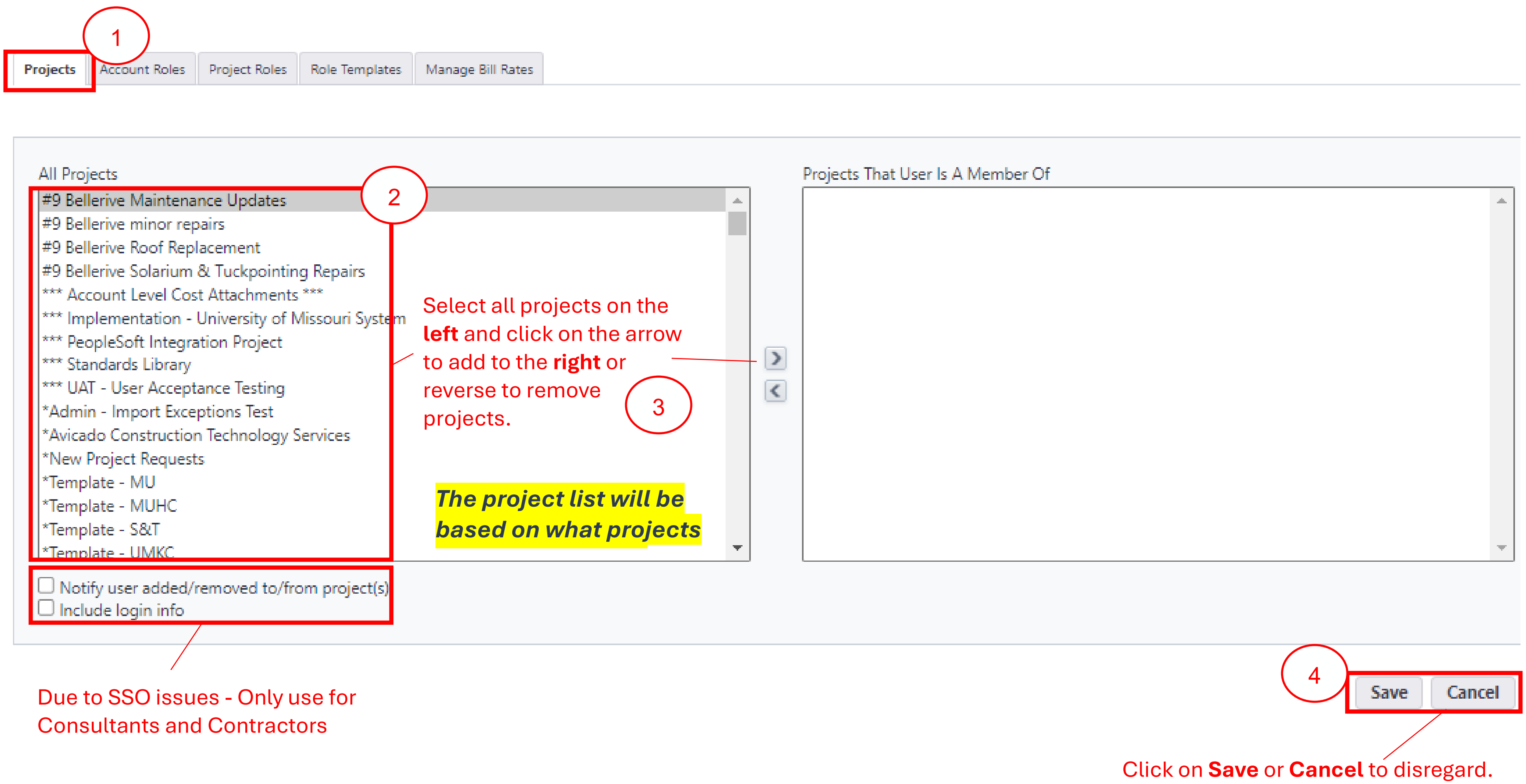


Use Account Level Roles sparingly to reduce confusion on who has responsibility and notifications. Best practice is to add roles such as PM and CPMs at the project level and Agreement/Contract Admins at the account level.

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.

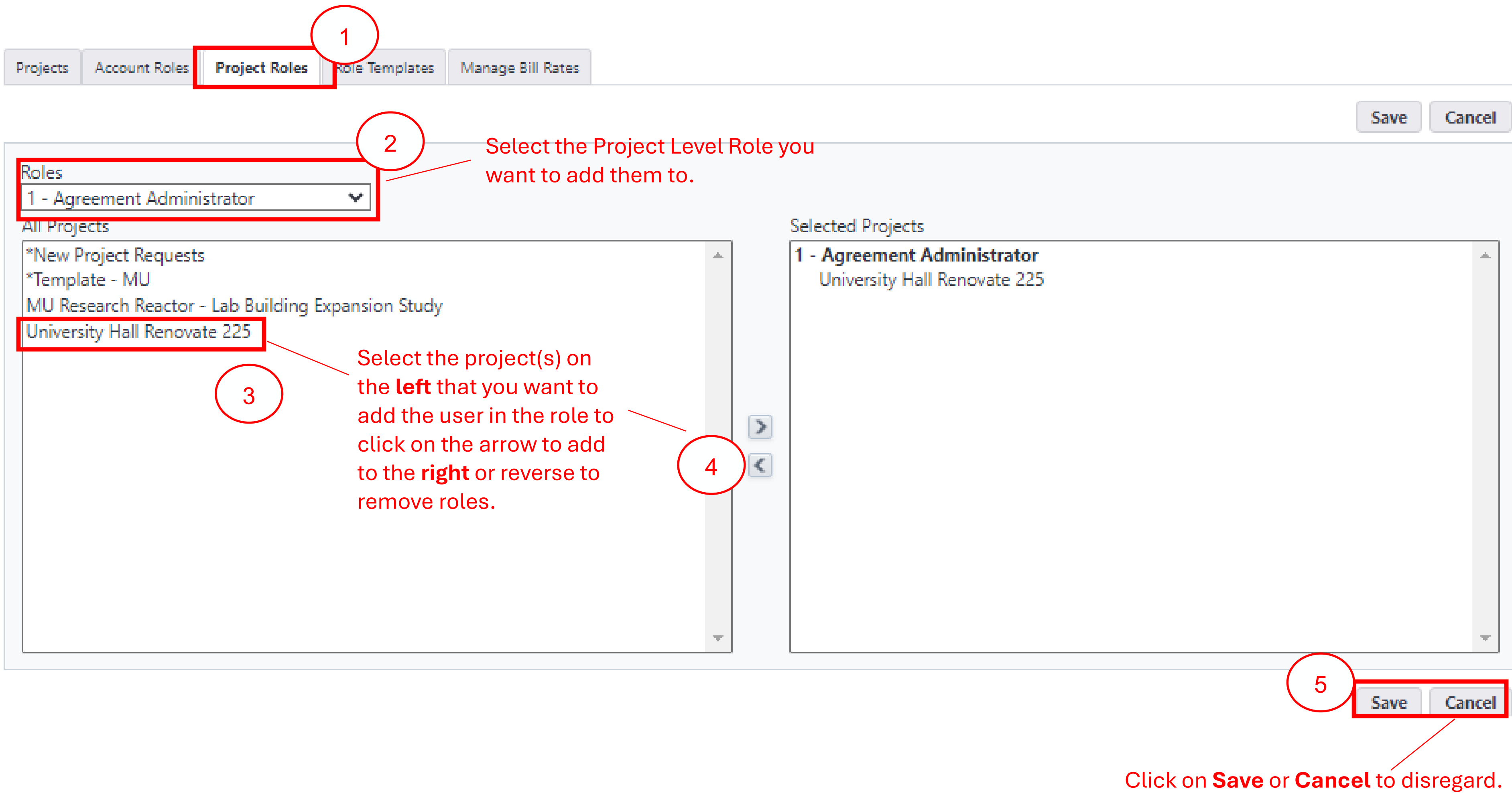
Navigate to the user you just created under **Setup \ Users \ Manage Users** and click on **Manage Membership**. Select all the projects on the left and with the arrow in the center, move them to the right. Click Save once completed, or cancel



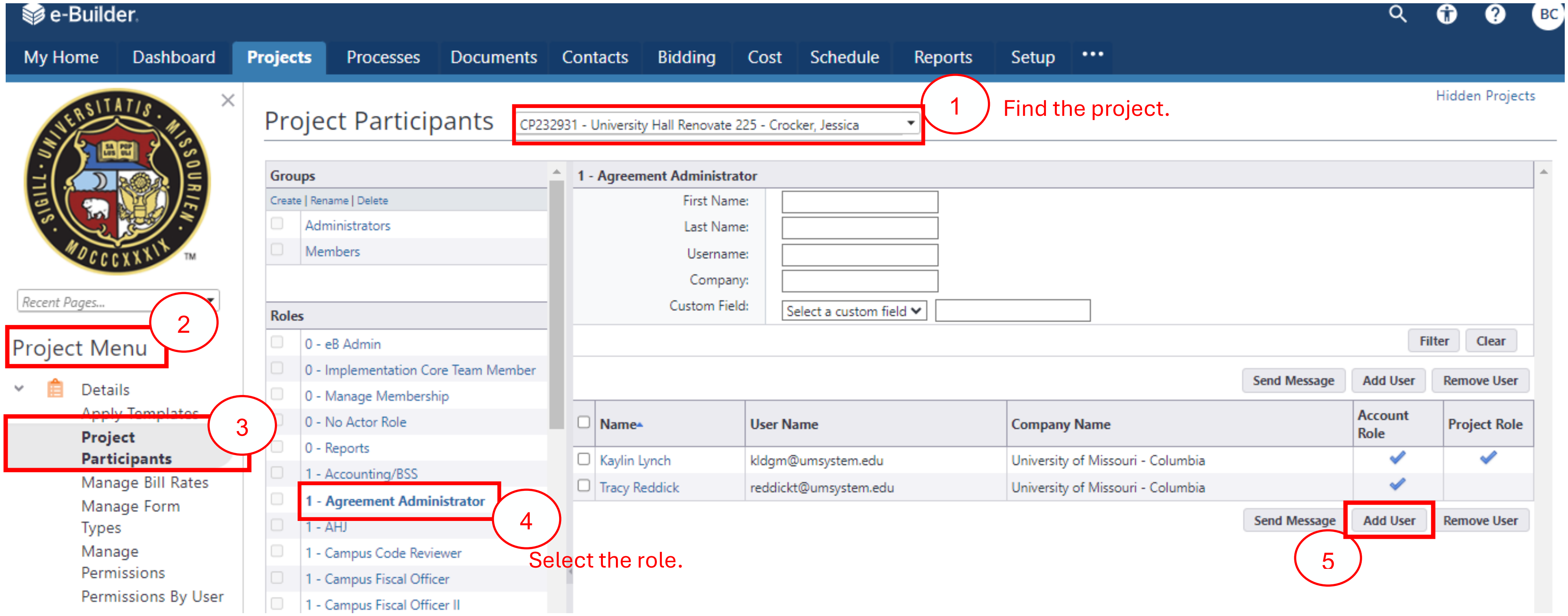
Add to Project Level Roles (Step 4) |

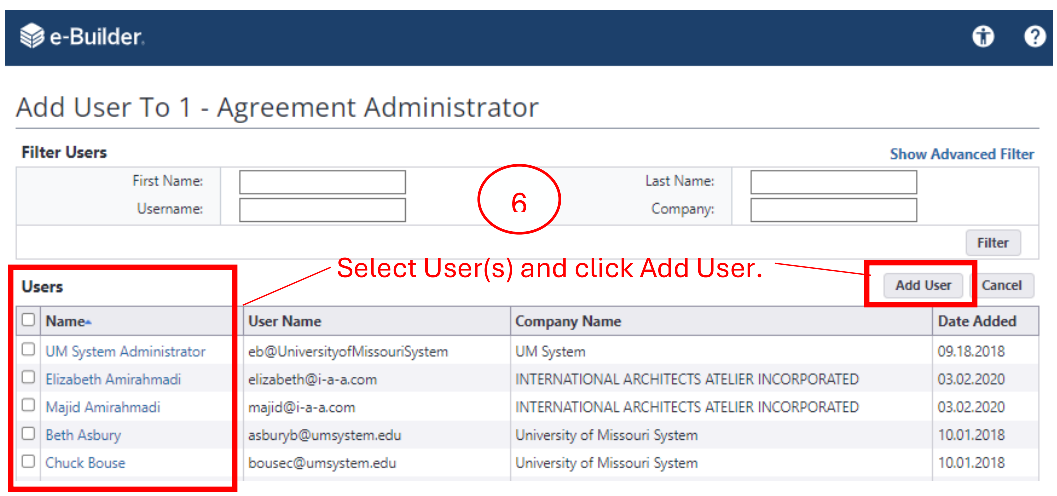
The newly created user needs to be in the appropriate **Project Level Roles** for the projects they are actively a participant on. There are two different ways to manage Project Level Roles: **Option 1** – Mange project level roles in the user's account, or **Option 2** – Mange project level roles at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

Option 1 – Mange 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:



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:



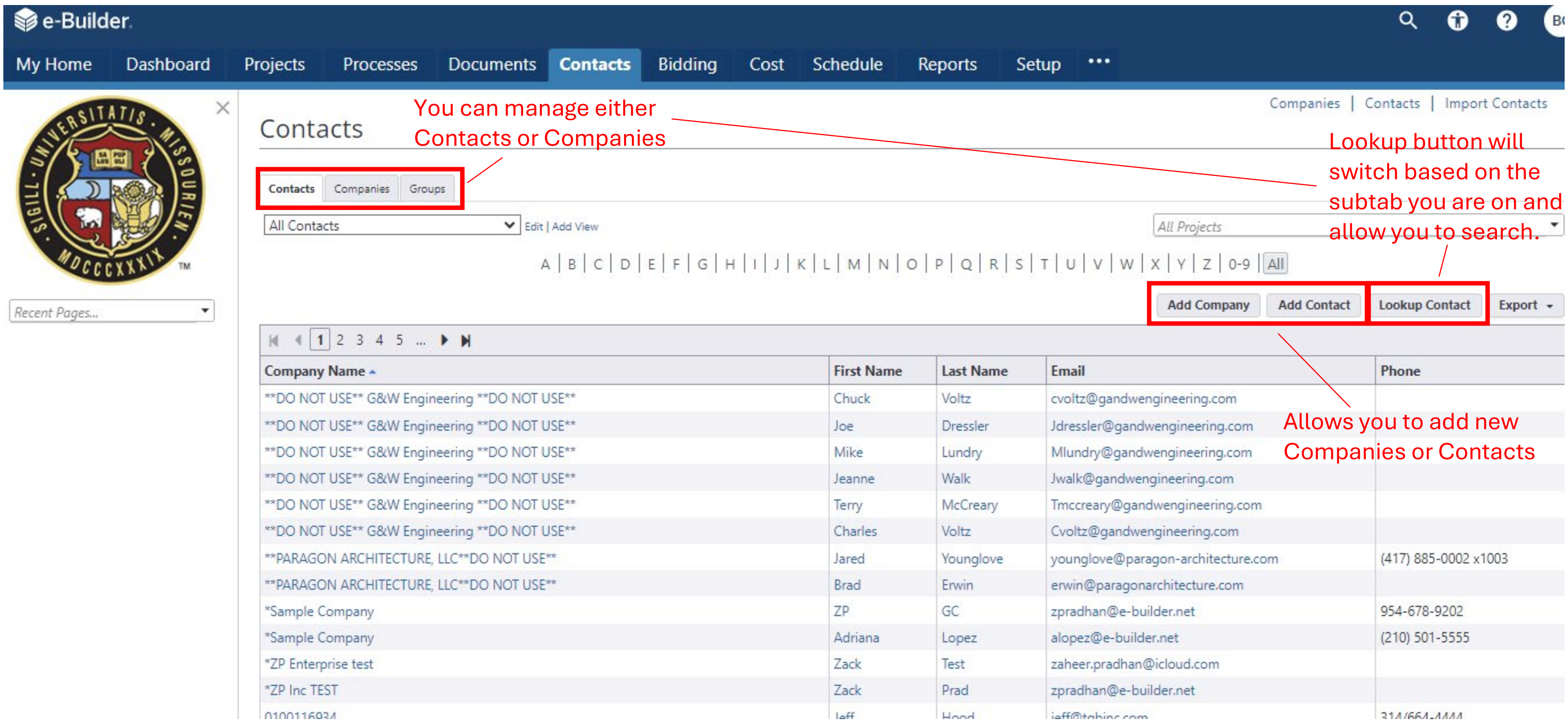


Note: You cannot manage Account Level Roles at the project.

Add Companies and Contacts – Navigation Overview |

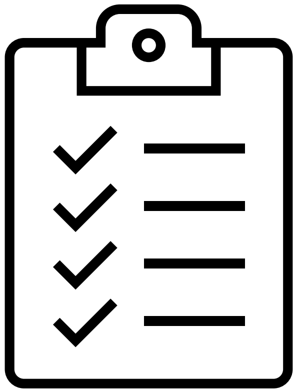
In eBuilder, we add and manage Companies and Contacts from the global tab **Contacts**. When adding a new Company, you first are required to ensure they have been set up in People Soft. When adding a new company, the Company Number (equivalent to the PS Account Number) is a required field and is generated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

Navigation Overview:



Note: Recommend adding and managing Contacts through the Companies Tab

New Company/Contact Setup – Check List:



Prework:

Verify Company doesn't exist in eBuilder

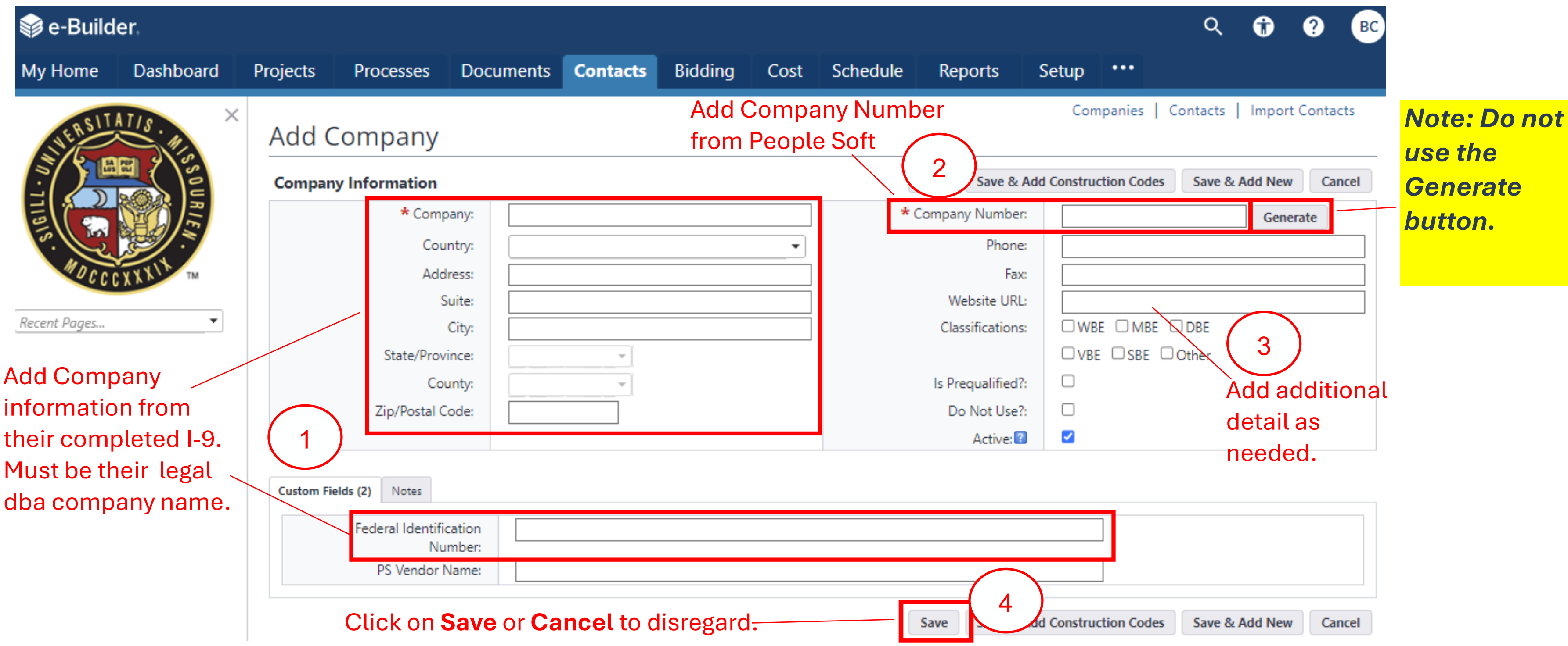
Verify the new Company has been set up in People Soft

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

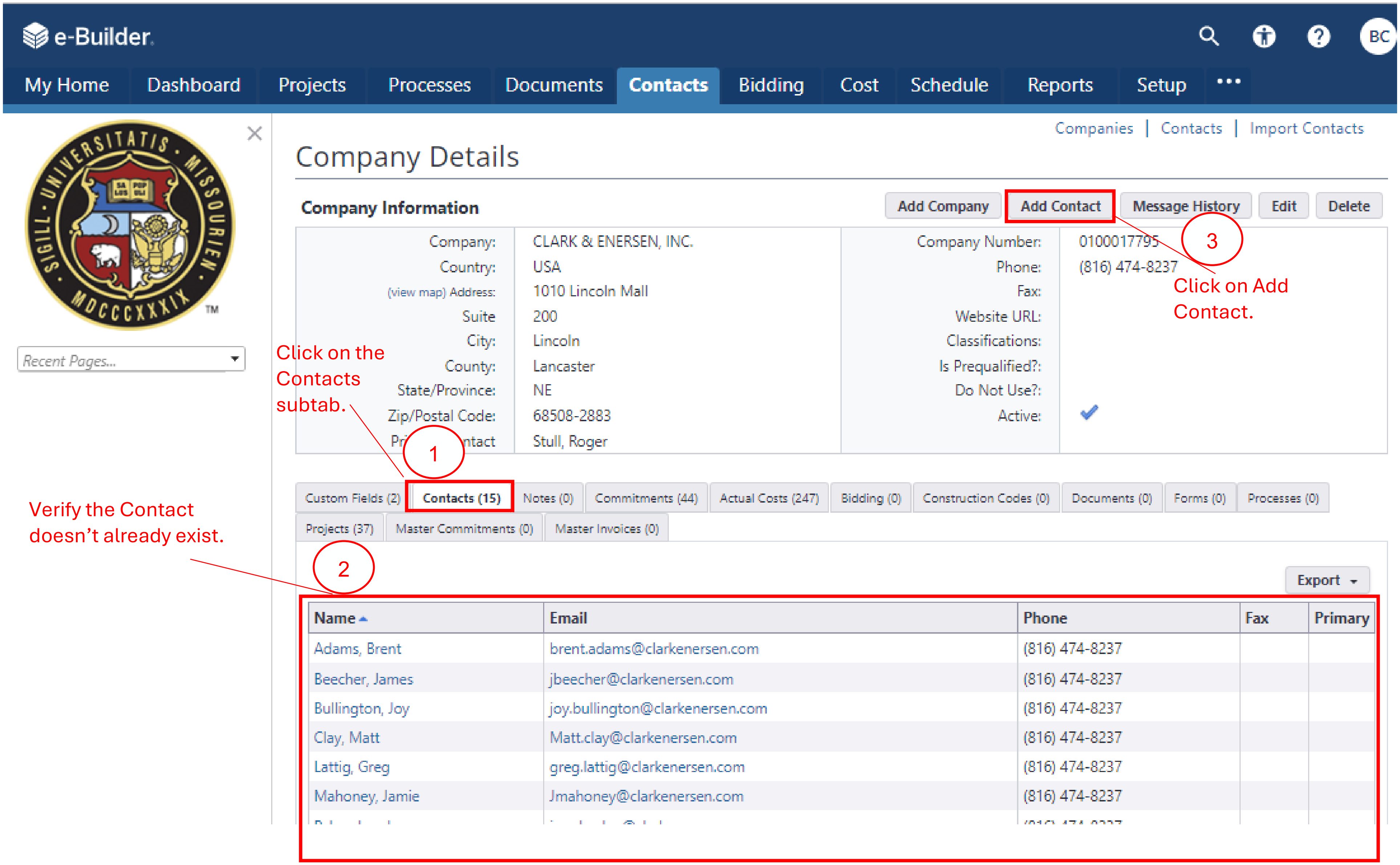
Add New Company (Step 1) |

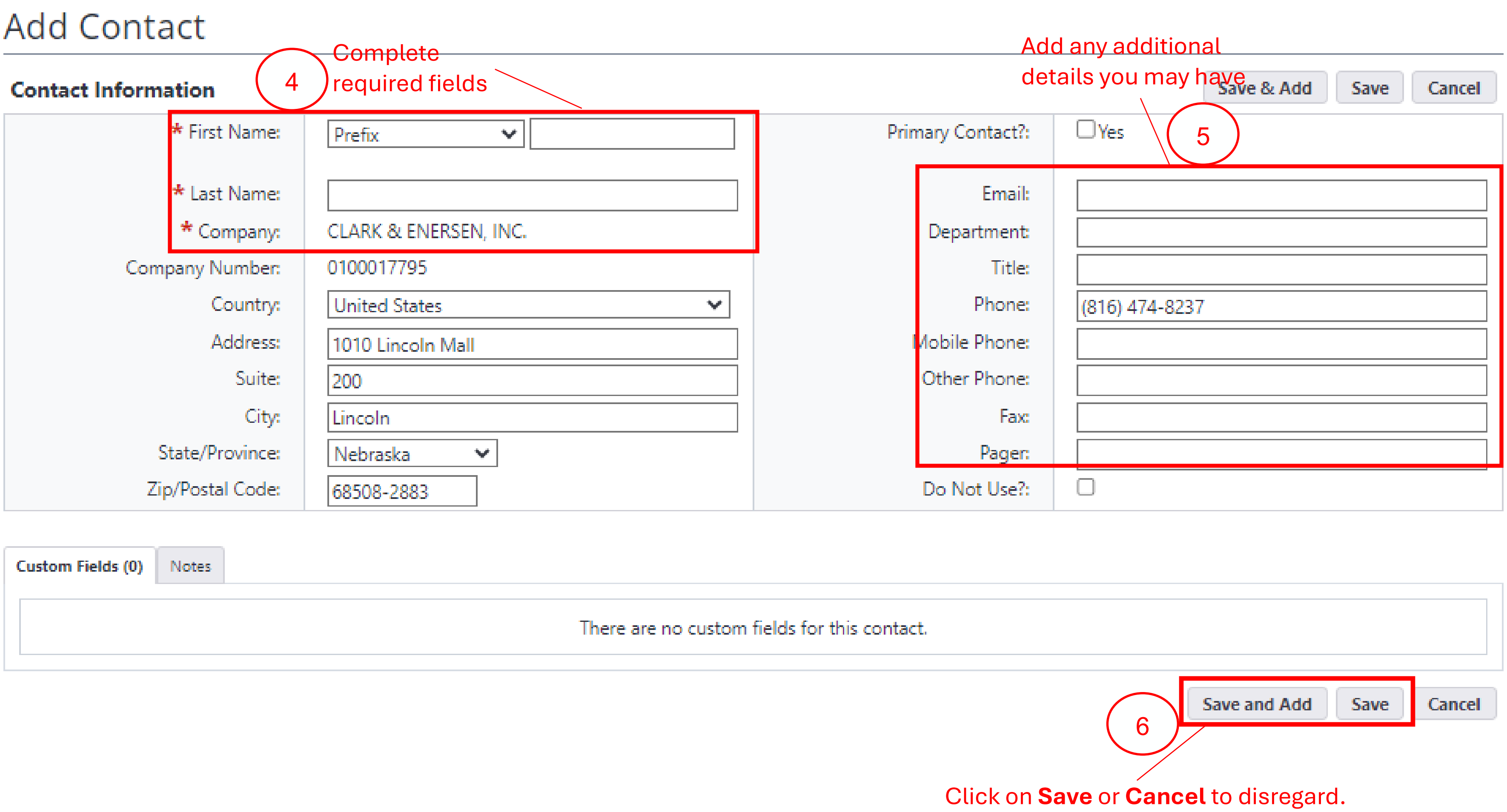
In eBuilder, navigate to the Global Tab **Contacts**. Click on the sub tab **Companies.** Click on Add Company in the upper right corner.



Add New Contacts (Step 2) |

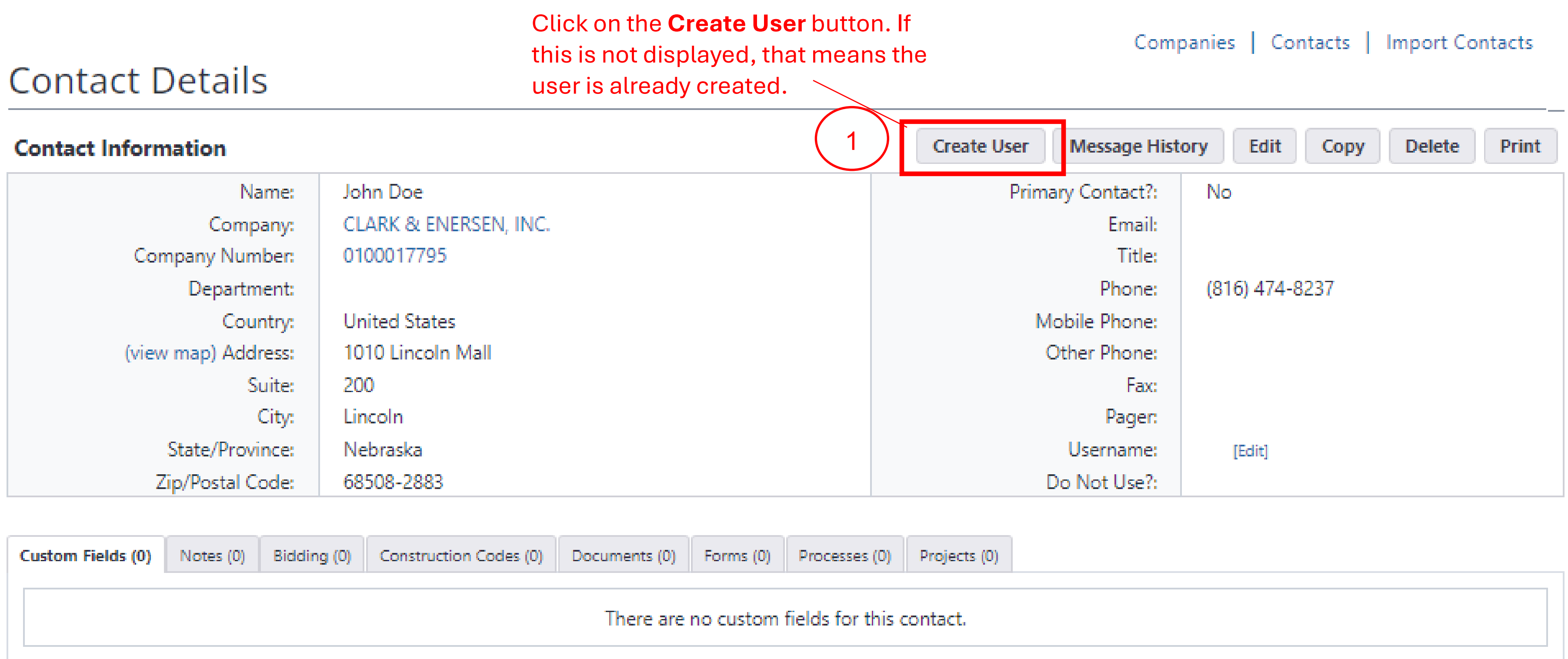
In eBuilder, navigate to the Company you need to add a contact.

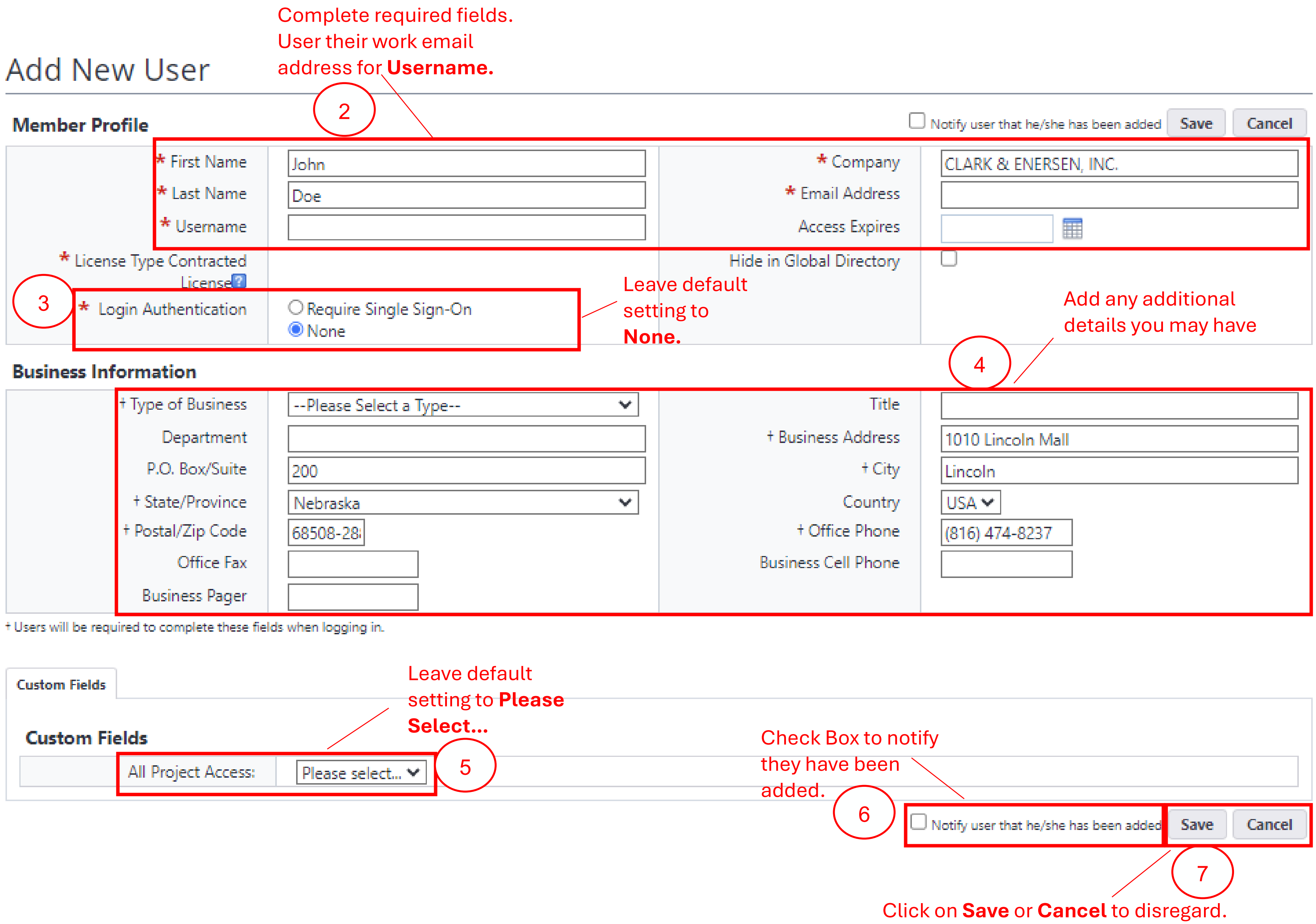



Add Contact
Contact Information
4
Complete
required fields
Add any additional
details you may have
Save & Add
Save
Cancel
* First Name:
Prefix
Primary Contact?:
Yes
5
* Last Name:
Email:
* Company:
CLARK & ENERSEN, INC.
Department:
Company Number:
0100017795
Title:
Country:
United States
Phone:
(816) 474-8237
Address:
1010 Lincoln Mall
Mobile Phone:
Suite:
200
Other Phone:
City:
Lincoln
Fax:
State/Province:
Nebraska
Pager:
Zip/Postal Code:
68508-2883
Do Not Use?:
Custom Fields (0)
Notes
There are no custom fields for this contact.
Save and Add
Save
Cancel
6
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:



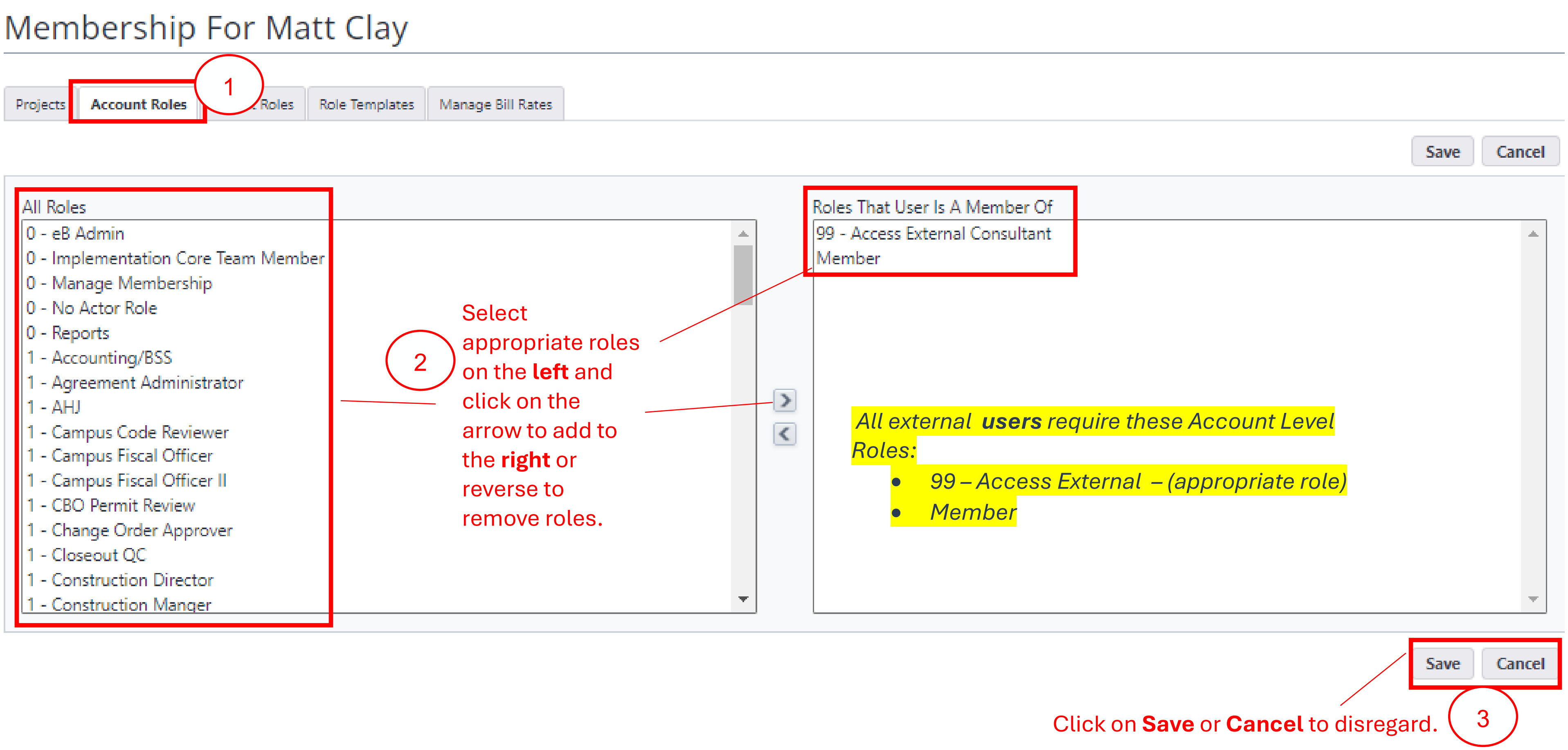

Complete required fields.
User their work email address for **Username.**
Add New User
Member Profile
Notify user that he/she has been added
Save
Cancel
2
* First Name
John
* Last Name
Doe
* Username
* Company
CLARK & ENERSEN, INC.
* Email Address
Access Expires
* License Type Contracted License
Hide in Global Directory
3
* Login Authentication
Require Single Sign-On
None
Leave default setting to **None.**
Add any additional details you may have
4
Business Information
† Type of Business
--Please Select a Type--
Department
P.O. Box/Suite
200
† State/Province
Nebraska
† Postal/Zip Code
68508-28
Office Fax
Business Pager
Title
† Business Address
1010 Lincoln Mall
† City
Lincoln
Country
USA
† Office Phone
(816) 474-8237
Business Cell Phone
† Users will be required to complete these fields when logging in.
Custom Fields
Leave default setting to **Please Select...**
Custom Fields
All Project Access:
Please select...
5
Check Box to notify they have been added.
6
Notify user that he/she has been added
Save
Cancel
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.

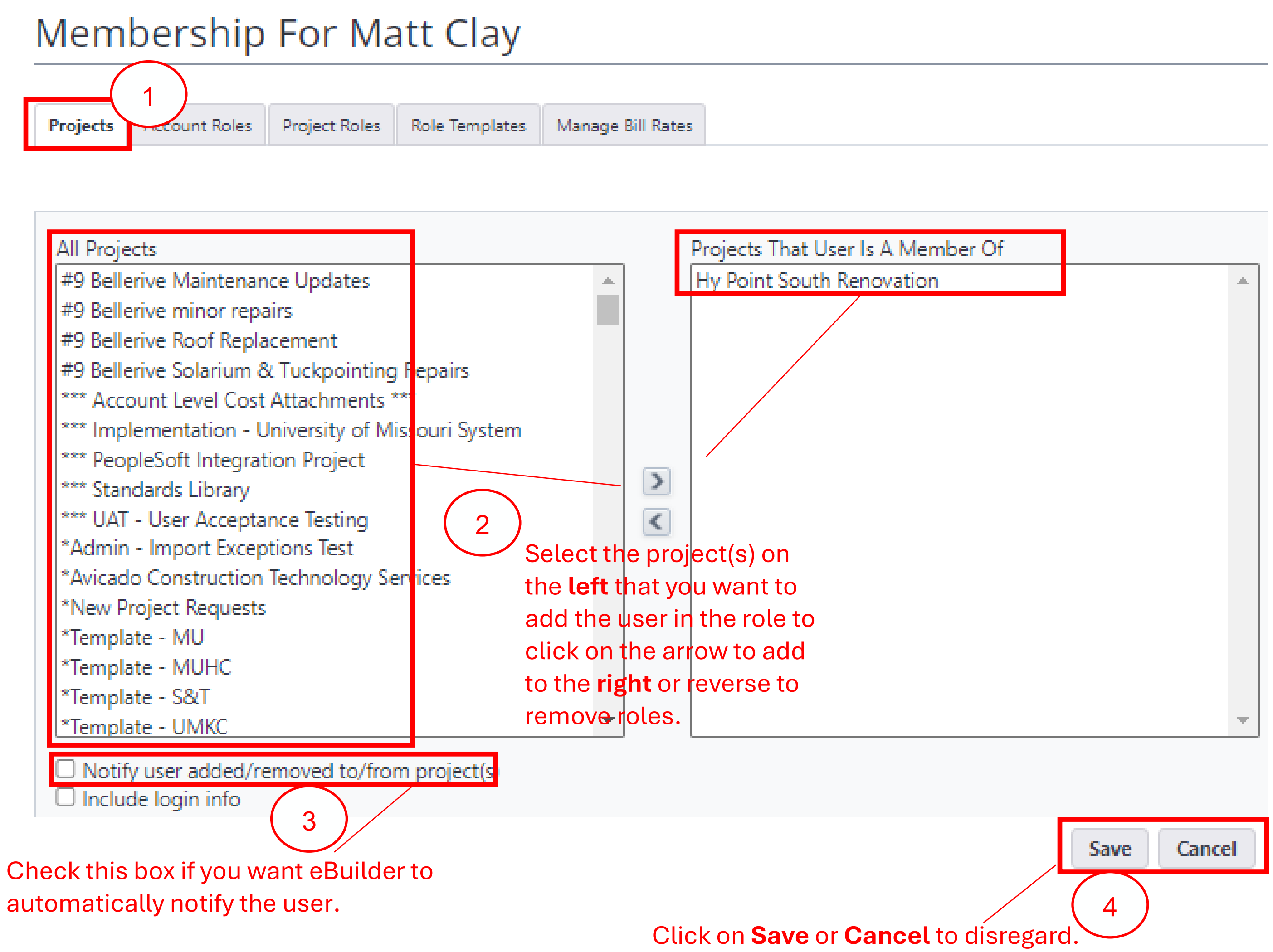
Account Level Roles:

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



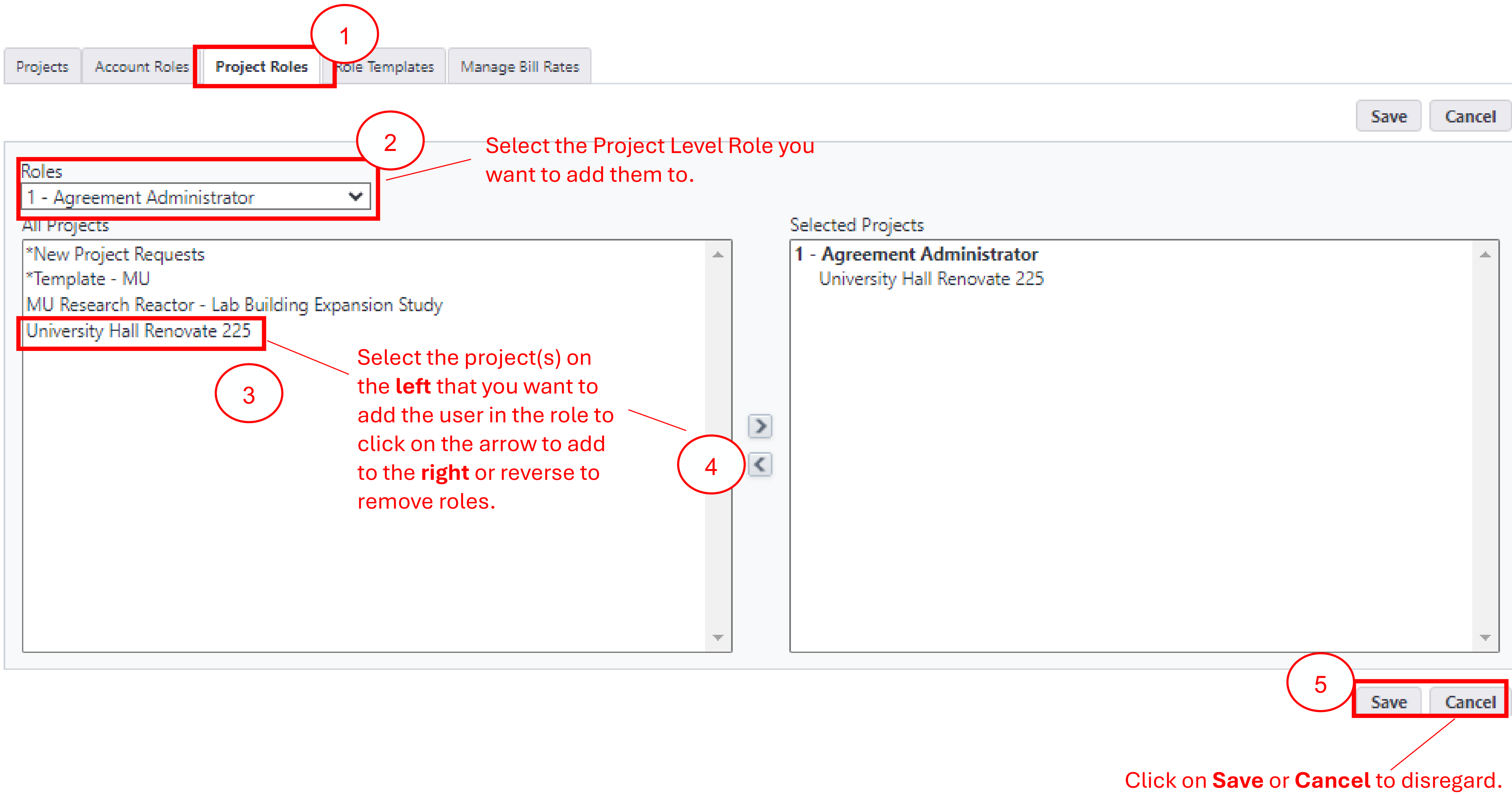
Project Assignment:

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:



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:



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

I = Initiate
R = Required

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 Assignor 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			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	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 Contructors	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	