



University of Missouri System

eBuilder Training

# Administering User Accounts and Roles

- Disclaimer
- Important Terms/Concepts
- Administering User Accounts/Roles
  - Navigation
  - Setup
  - Roles
  - Modify Existing
- Administering Companies/Contacts
  - Navigation
  - Setup
  - Creating User Accounts/Roles
  - Modify Existing
- Troubleshooting Hints
- Questions

## 0 – Manage Membership (Admin Role)

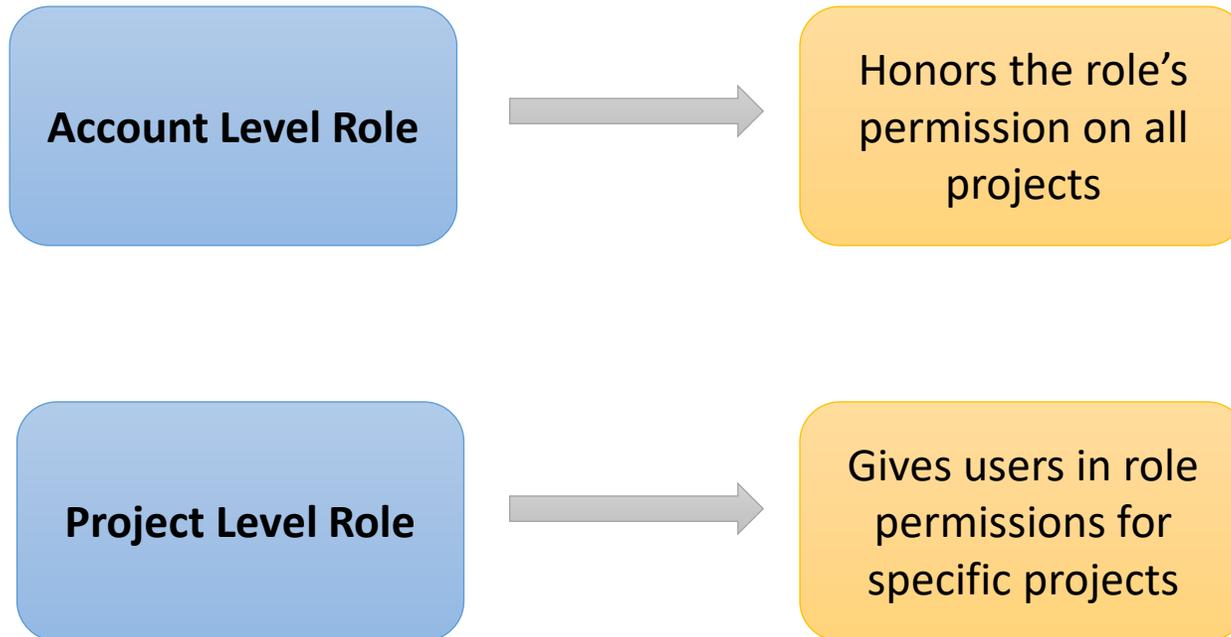
- Create users – establishes userid in e-Builder
- Ability to reset password for non-SSO users
- Manages project participants
- Ability to add/remove roles to users on the account level and project level
- Ability to manage your own permissions
- Set an expiration date for users no longer active
- Remove users (not recommended). We have unlimited licenses, e-Builder recommends we set an expiration date

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 (only used for campus staff)

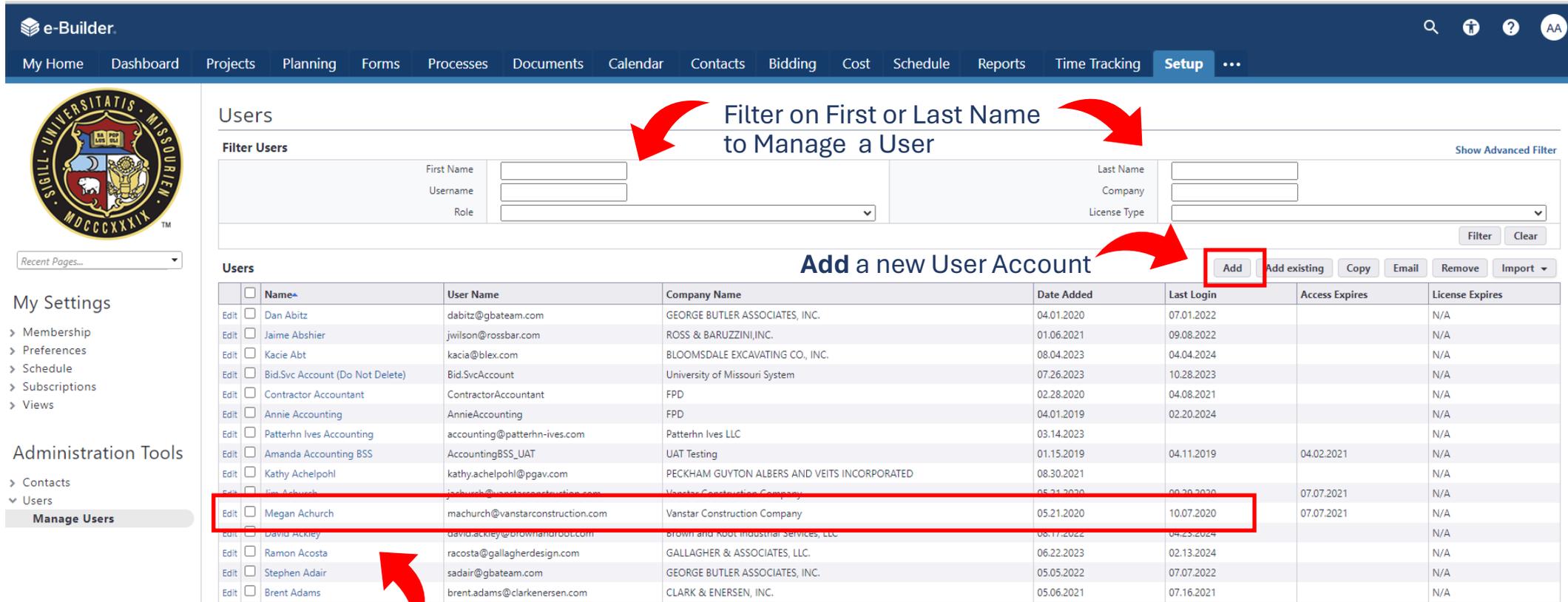
### Concepts:

- User Accounts can include both Internal and External Users of PDC
- UM System Single-Sign-On (SSO) requires **username@UMSystem.edu** address 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 processes with commitments
- 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

## Account Level Role vs Project Level Role



**Navigation** - From the Global Tabs click on Setup\ Administration Tools\Users\Manage Users



**Users**

**Filter Users** Show Advanced Filter

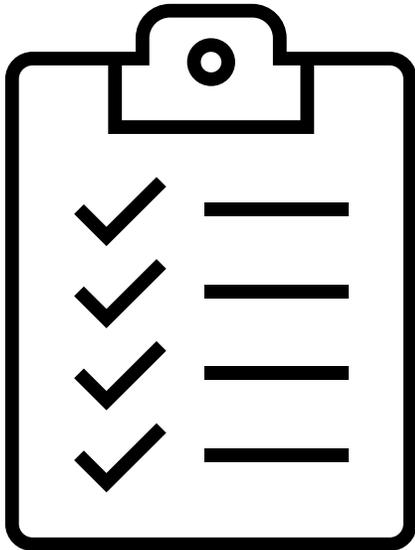
First Name  Last Name   
 Username  Company   
 Role  License Type

**Add a new User Account** Add Add existing Copy Email Remove Import

<input type="checkbox"/>	Name	User Name	Company Name	Date Added	Last Login	Access Expires	License Expires
Edit <input type="checkbox"/>	Dan Abitz	dabitz@gbateam.com	GEORGE BUTLER ASSOCIATES, INC.	04.01.2020	07.01.2022		N/A
Edit <input type="checkbox"/>	Jaime Abshier	jwilson@rossbar.com	ROSS & BARUZZINI, INC.	01.06.2021	09.08.2022		N/A
Edit <input type="checkbox"/>	Kacie Abt	kacia@blex.com	BLOOMSDALE EXCAVATING CO., INC.	08.04.2023	04.04.2024		N/A
Edit <input type="checkbox"/>	Bid.Svc Account (Do Not Delete)	Bid.SvcAccount	University of Missouri System	07.26.2023	10.28.2023		N/A
Edit <input type="checkbox"/>	Contractor Accountant	ContractorAccountant	FPD	02.28.2020	04.08.2021		N/A
Edit <input type="checkbox"/>	Annie Accounting	AnnieAccounting	FPD	04.01.2019	02.20.2024		N/A
Edit <input type="checkbox"/>	Patterhn Ives Accounting	accounting@patterhn-ives.com	Patterhn Ives LLC	03.14.2023			N/A
Edit <input type="checkbox"/>	Amanda Accounting BSS	AccountingBSS_UAT	UAT Testing	01.15.2019	04.11.2019	04.02.2021	N/A
Edit <input type="checkbox"/>	Kathy Achelpohl	kathy.achelpohl@pgav.com	PECKHAM GUYTON ALBERS AND VEITS INCORPORATED	08.30.2021			N/A
Edit <input type="checkbox"/>	Jim Achurch	jachurch@vanstarconstruction.com	Vanstar Construction Company	05.21.2020	09.20.2020	07.07.2021	N/A
Edit <input type="checkbox"/>	Megan Achurch	machurch@vanstarconstruction.com	Vanstar Construction Company	05.21.2020	10.07.2020	07.07.2021	N/A
Edit <input type="checkbox"/>	David Ackley	david.ackley@brownandroot.com	Brown and Root Industrial Services, LLC	08.17.2022	04.23.2024		N/A
Edit <input type="checkbox"/>	Ramon Acosta	racosta@gallagherdesign.com	GALLAGHER & ASSOCIATES, LLC.	06.22.2023	02.13.2024		N/A
Edit <input type="checkbox"/>	Stephen Adair	sadair@gbateam.com	GEORGE BUTLER ASSOCIATES, INC.	05.05.2022	07.07.2022		N/A
Edit <input type="checkbox"/>	Brent Adams	brent.adams@clarkenersen.com	CLARK & ENERSEN, INC.	05.06.2021	07.16.2021		N/A

Click on the Username to **Edit** their Account

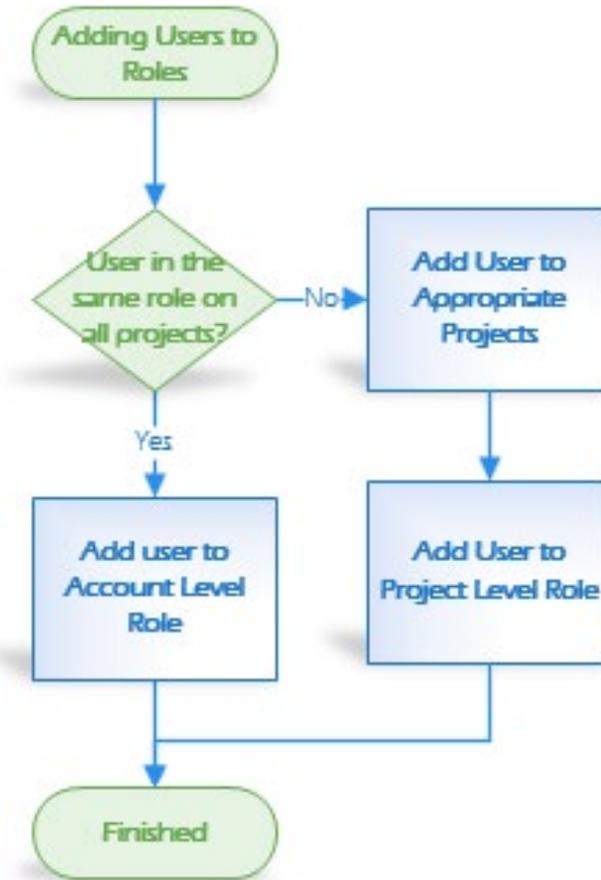
## New User Setup – Check List



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

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

## Flowchart for Roles



## Step 1. Create New User - Navigate to the **Manage Users** screen and click **Add**

**Note:** Search for username before adding.

Add New User

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

Enter required information

* First Name	<input type="text"/>	* Company	<input type="text"/>
* Last Name	<input type="text"/>	* Email Address	<input type="text"/>
* Username	<input type="text" value="Username@UMSystem.edu"/>	Access Expires	<input type="text"/> <input type="text"/>
* License Type Contracted License	<input type="checkbox"/>	Hide in Global Directory	<input type="checkbox"/>
Require Single Sign On	<input type="checkbox"/>	Add New User as Contact	<input type="checkbox"/>

Username cannot be modified after the user is saved

**Business Information**

SSO is required for University Employees only

+ 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.

Set to user's campus

Once done click on **Save** or **Cancel** to disregard

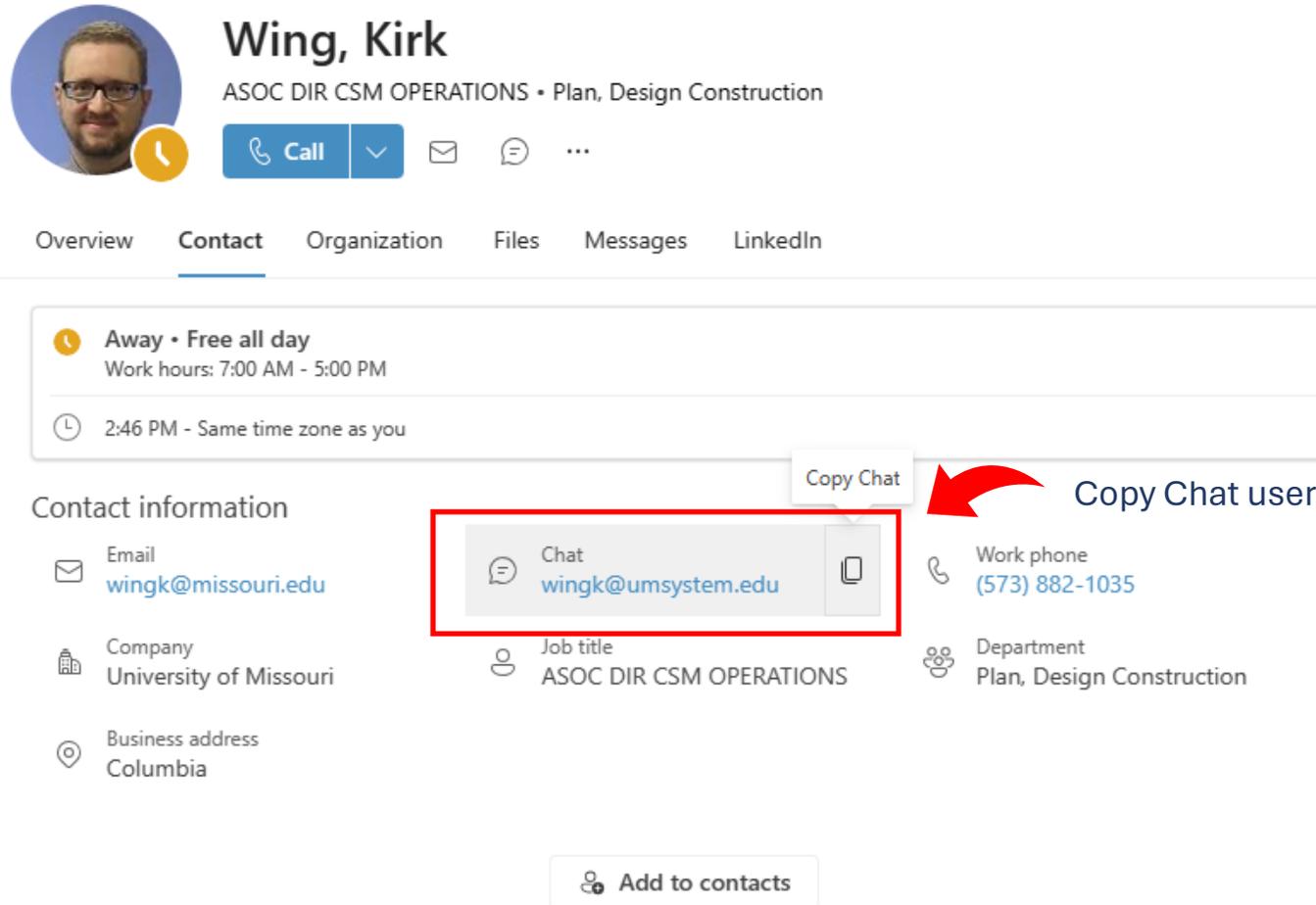
Do not use due to SSO issues

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

**Note:** The username is required to be **username@UMSystem.edu** email address for the SSO to work correctly.

**Outlook**> add user email:> hover on email to **Show More**

**Tip:** You can copy Email and Chat addresses from Outlook, and other useful information.



**Wing, Kirk**  
ASOC DIR CSM OPERATIONS • Plan, Design Construction

Overview **Contact** Organization Files Messages LinkedIn

**Away • Free all day**  
Work hours: 7:00 AM - 5:00 PM

2:46 PM - Same time zone as you

**Contact information**

- Email: [wingk@missouri.edu](mailto:wingk@missouri.edu)
- Company: University of Missouri
- Business address: Columbia
- Chat: [wingk@umsystem.edu](mailto:wingk@umsystem.edu)
- Work phone: (573) 882-1035
- Department: Plan, Design Construction
- Job title: ASOC DIR CSM OPERATIONS

**Add to contacts**

Copy Chat

Copy Chat user address for Username

## Step 2. Add Account Level Roles – Navigate to the user under setup and click on **Manage Membership**

### Membership For Kirk Wing

Projects **Account Roles** Project Roles Role Templates Manage Bill Rates

All Roles

- 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
- 1 - Construction Manger
- 1 - Construction Project Manager (CPM)
- 1 - Contract MU

Roles That User Is A Member Of

- 1 - Design Staff
- 99 - Access Edit - Internal User Member

**All *internal users* require these Account Level Roles:**

- 99 – Access Edit – Internal Users
- Member

**All *external users* need to also have Member role, plus the appropriate 99 - role**


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

**Note:** 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.

Click **Save** or **Cancel** once done

## Steps 3 & 4. Add to Project Template and Projects – Navigate to Setup\Users\Manage Users>Select User: click on **Manage Membership**

### Membership For Kirk Wing

Projects
Account Roles
Project Roles
Role Templates
Manage Bill Rates

All Projects

- #9 Bellerive Maintenance Updates
- #9 Bellerive minor repairs
- #9 Bellerive Roof Replacement
- \*\*\* Account Level Cost Attachments \*\*\*
- \*\*\* Implementation - University of Missouri System
- \*\*\* PeopleSoft Integration Project
- \*\*\* Standards Library
- \*\*\* UAT - User Acceptance Testing
- \*Admin - Import Exceptions Test
- \*Avicado Construction Technology Services
- \*Template - MUHC
- \*Template - S&T
- \*Template - UMKC
- \*Template - UMSL
- \*Template - University of Missouri System
- || Magicians Center Of The Improvement Of Escapology
- 104 Physics Install Monitor
- 106 Centennial Renovation

Projects That User Is A Member Of

- \*New Project Requests
- \*Template - MU
- Documentation test #3
- MU PDC Transition to eBuilder
- MU Research Reactor - Lab Building Expansion Study
- Remodel 3rd floor
- University Hall Renovate 225

Project

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

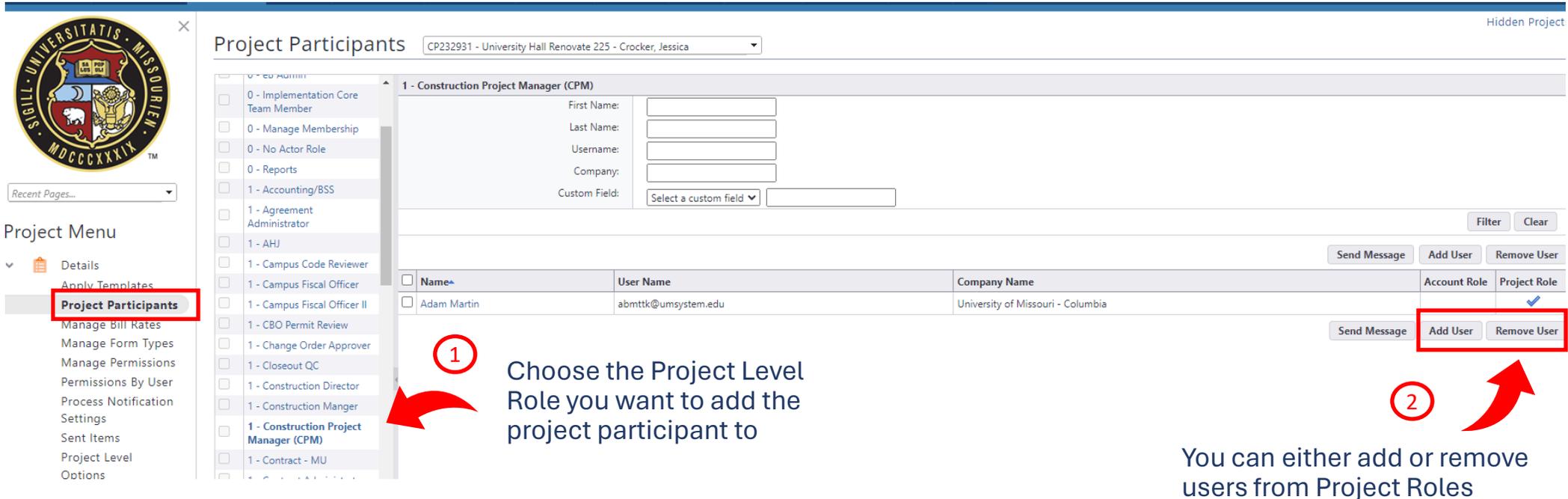
All university employee users need to be added to \*Template – Their Campus (MU, S&T, UMSL, UMKC, MUHC) and to any existing projects they will have a role in.

**Tip:** You can navigate to the project and add users there as another option.

**Note:** Internal users will be added to all newly created projects via the \*Template – MU. For existing projects, highlight the complete list on the left and move to the right.

Click **Save** or **Cancel** once done

## Step 5. Adding Project Level Roles – Navigate to the Project\Details\Project Participants: Select User



Project Participants CP232931 - University Hall Renovate 225 - Crocker, Jessica

1 - Construction Project Manager (CPM)

First Name:

Last Name:

Username:

Company:

Custom Field:

Name	User Name	Company Name	Account Role	Project Role
<input type="checkbox"/> Adam Martin	abmttk@umsystem.edu	University of Missouri - Columbia		<input checked="" type="checkbox"/>

Send Message Add User Remove User

Send Message Add User Remove User

1 Choose the Project Level Role you want to add the project participant to

2 You can either add or remove users from Project Roles

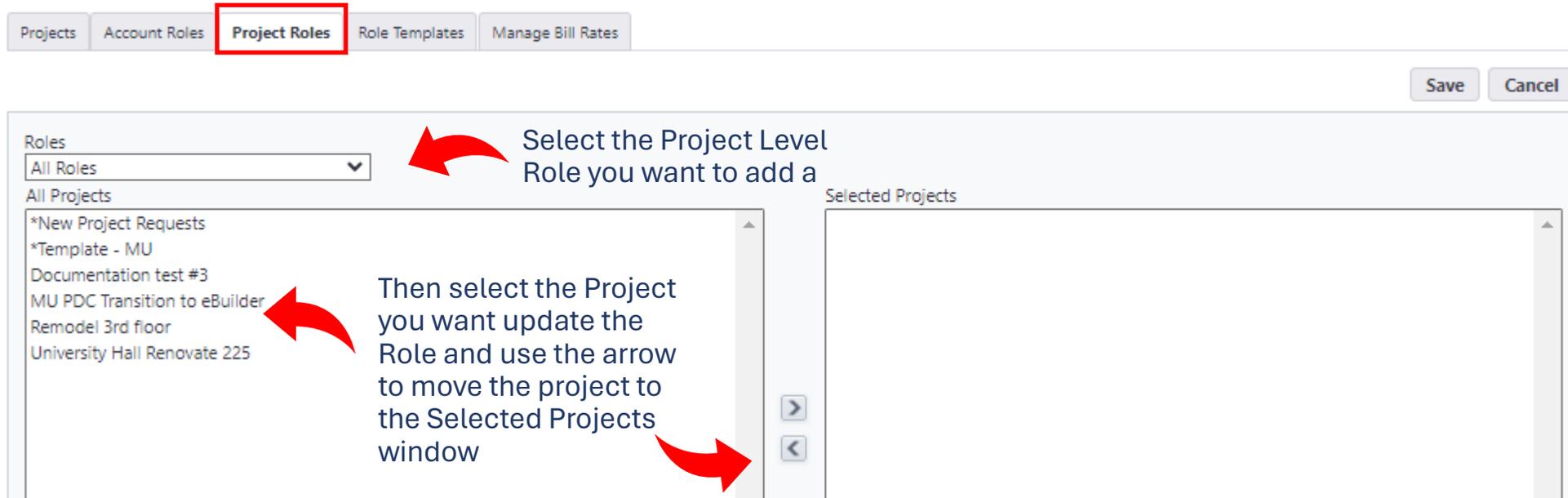
**Note:** You cannot manage **Account Level** roles at the project.

Click **Save** or **Cancel** once done

## Step 5. Adding Project Level Roles (Option 2): Navigate to Setup\Users\Manage Users

Find user, click on Manage Membership and select the Project Roles tab

### Membership For Kirk Wing



Projects Account Roles **Project Roles** Role Templates Manage Bill Rates

Save Cancel

Roles  
All Roles

All Projects

- \*New Project Requests
- \*Template - MU
- Documentation test #3
- MU PDC Transition to eBuilder
- Remodel 3rd floor
- University Hall Renovate 225

Selected Projects

Select the Project Level Role you want to add a

Then select the Project you want update the Role and use the arrow to move the project to the Selected Projects window

Click **Save** or **Cancel** once done

**Navigation** - From the Global Tabs click on Setup\Administration Tools\Users\Manage Users: find user click **Edit**

## Edit User

**Member Profile** Save Cancel

* First Name	<input type="text" value="Kirk"/>	* Company	<input type="text" value="University of Missouri - Columbia"/>
* Last Name	<input type="text" value="Wing"/>	* Email Address	<input type="text" value="wingk@missouri.edu"/>
Username	<input type="text" value="wingk@umsystem.edu"/>	Access Expires	<input type="text" value=""/>
* License Type Contracted License <input type="checkbox"/>		Hide in Global Directory	<input type="checkbox"/>
Require Single Sign On	<input type="checkbox"/>		

Username cannot be modified after the user is saved.

Enter departure date. This will disable the account.

**Business Information**

+ Type of Business	<input type="text" value="Owner / Owner's Rep"/>	Title	<input type="text" value="Associate Director - Design Services"/>
Department	<input type="text" value="Planning, Design &amp; Construction"/>	+ Business Address	<input type="text" value="130 General Services Building"/>
P.O. Box/Suite	<input type="text" value="900 E Stadium Blvd"/>	+ City	<input type="text" value="Columbia"/>
+ State/Province	<input type="text" value="Missouri"/>	Country	<input type="text" value="United States"/>
+ Postal/Zip Code	<input type="text" value="65211"/>	+ Office Phone	<input type="text" value="573-882-1035"/>
Office Fax	<input type="text" value=""/>	Business Cell Phone	<input type="text" value=""/>
Business Pager	<input type="text" value=""/>		

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

**Custom Fields**

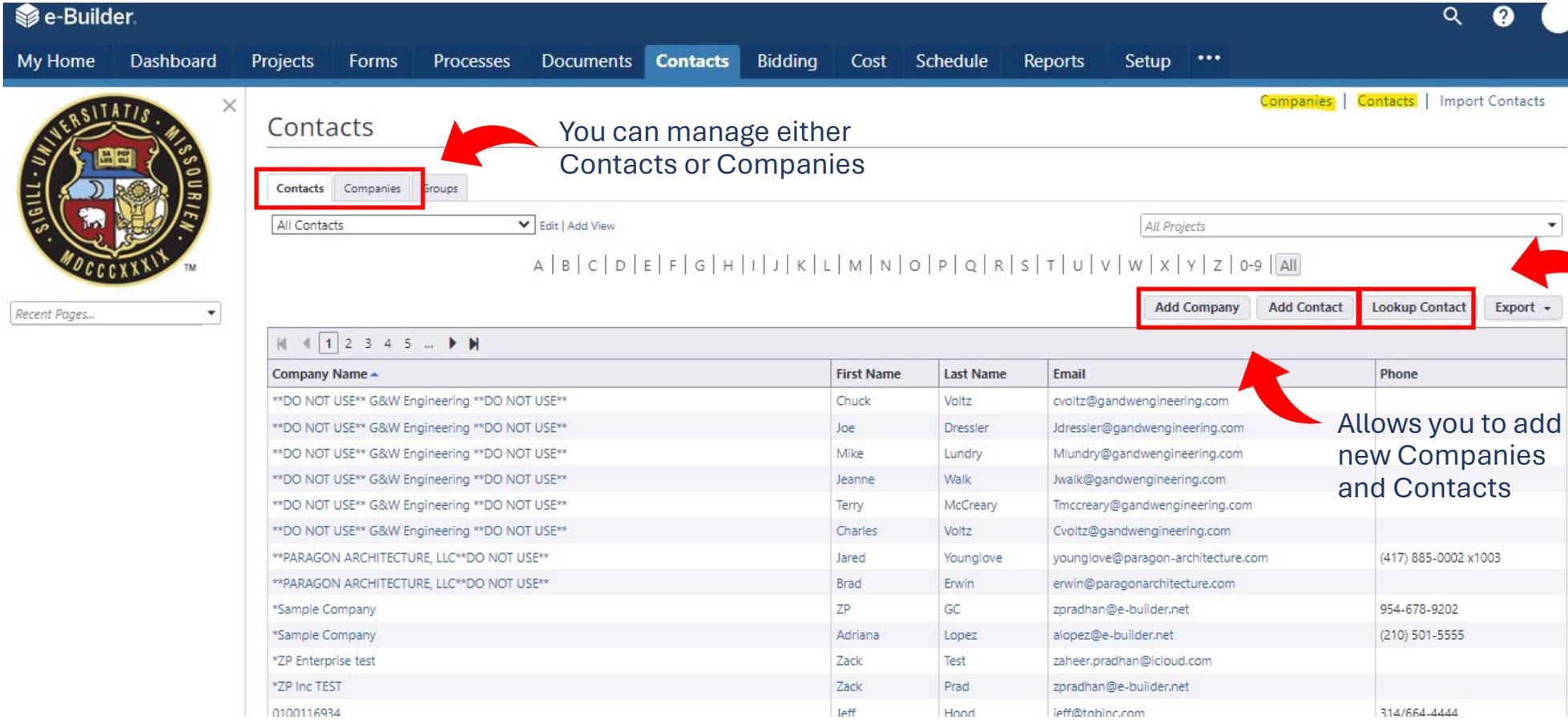
Custom Fields

All Project Access:

Save Cancel

Make necessary edits, click on **Save** or **Cancel** to disregard.

**Navigation** - From the Global Tabs click on **Companies** or **Contacts**



**Contacts** You can manage either Contacts or Companies

Contacts Companies Groups

All Contacts Edit | Add View All Projects

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | 0-9 | All

Add Company Add Contact Lookup Contact Export

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	
0100116934	ieff	Hood	ieff@trhinc.com	314/664.4444

**Note:** Best practice is to add or convert a user through the Companies Tab

**Navigation** - From the Global Tabs click on Contacts\Companies\Lookup Company\Filter Company

## Company Details

Add Company
Add Contact
Message History
Edit
Delete

<p><b>Company Information</b></p> <p>Company: NABHOLZ CONSTRUCTION CORPORATION          Country: USA          (view map) Address: 17300 West 116th Street          Suite          City: Lenexa          County:          State/Province: KS          Zip/Postal Code: 66219-9612          Primary Contact</p>	<p>Company Number: 0100337302          Phone: (417) 450-6021          Fax:          Website URL:          Classifications:          Is Prequalified?:          Do Not Use?:          Active: <input checked="" type="checkbox"/></p>
---	--

Custom Fields (2)
Contacts (30)
Notes (0)
Commitments (26)
Actual Costs (67)
Bidding (5)
Construction Codes (0)
Documents (0)
Forms (0)
Processes (0)
Projects (30)
Master Commitments (3)
Master Invoices (42)

**Useful Information** Export ▾

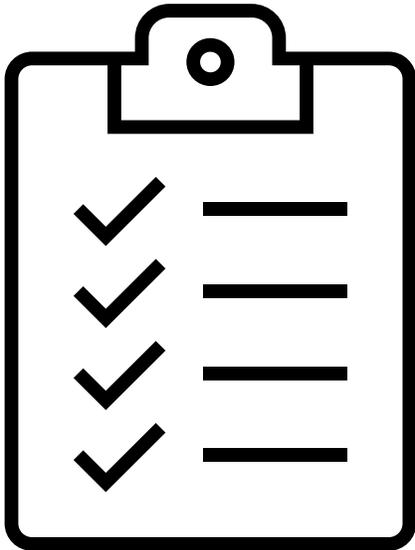
Name ▾	Email	Phone	Fax	Primary
Arbanas, Luke	luke.arbanas@nabholz.com	(417) 450-6021		
Arunski, Matt	matt.arunski@nabholz.com	(417) 450-6021		
Berthelson, Susan	susan.berthelson@nabholz.com	(417) 450-6021		
Bowen, Brady	brady.bowen@nabholz.com	(417) 450-6021		
Brown, Brennon	brennon.brown@nabholz.com	(417) 450-6021		
Conus, Casey	Casey.conus@nabholz.com	(417) 450-6021		
Cummings, Amy	amy.cummings@nabholz.com	(417) 450-6020		
Fuemmeler, Mitchell	mitchell.fuemmeler@nabholz.com	(417) 450-6021		

To Add a Contact or edit Company information.

Useful Information

List of all the Contacts

## Add New Company – Check List



1. Verify it doesn't exist
2. Verify W9 has been sent to Accounting
3. Complete Direct Deposit Form
4. PS Vendor Number (Company Number in eBuilder)
5. Company information
6. Add Account and Project Level Roles

**Notes:**

- *Company Numbers will always need to start with 01 and can only be 10 characters in length.*
- *The Company Name will be used for Mail Merge documents. Use the legal spelling of their name.*

**Navigation** - From the Global Tabs click on Contacts\Companies Sub Tab\click **Add Company**

**Add Company**

**Company Information**

**Complete required fields and any additional information**

**DO NOT use the auto generate button**

**Must select country for the State to populate**

**Ensure the Active box is checked**

**Enter FIN from their W-9**

**Save Save & Add Construction Codes Save & Add New Cancel**

**Generate**

**Save Save & Add Construction Codes Save & Add New Cancel**

**Custom Fields (2) Notes**

Federal Identification Number:

PS Vendor Name:

**Notes:**

- *New companies need to be added to PS first to establish a Company Number. Company Numbers are required to start with 01 and 10 characters in length*
- *For legal contract standards, the Company Name should be entered in ALL CAPS and entered as their dba name.*

Once done, click on **Save** or **Cancel**

**Option 1:** Navigate to the company and add contact (Best Practice)

**Navigation** - From the Global Tabs click on Contacts\Look up Company\click **Add Contact**

## Add Contact

**Contact Information** Save & Add Save Cancel

**Complete required fields** 

* First Name:	Prefix <input type="text"/>	Primary Contact?:	<input type="checkbox"/> Yes
* Last Name:	<input type="text"/>	Email:	<input type="text"/>
* Company:	NABHOLZ CONSTRUCTION CORPORATION	Department:	<input type="text"/>
Company Number:	0100337302	Title:	<input type="text"/>
Country:	United States <input type="text"/>	Phone:	(417) 450-6021
Address:	17300 West 116th Street	Mobile Phone:	<input type="text"/>
Suite:	<input type="text"/>	Other Phone:	<input type="text"/>
City:	Lenexa	Fax:	<input type="text"/>
State/Province:	Kansas <input type="text"/>	Pager:	<input type="text"/>
Zip/Postal Code:	66219-9612	Do Not Use?:	<input type="checkbox"/>

**Custom Fields (0)**

There are no custom fields for this contact.

Save and Add Save Cancel

Once done, click on **Save** or **Cancel**

**Option 2:** Navigate to Contacts global tab and click Add Contact. You will have any option to select the Company

**Navigation** - From the Global Tabs click on Contacts\Look up Company\click **Add Contact**

## Add Contact

**Contact Information** Complete required fields Save & Add Save Cancel

* First Name:	Prefix <input type="text"/>	Primary Contact?:	<input type="checkbox"/> Yes
* Last Name:	<input type="text"/>	Email:	<input type="text"/>
* Company:	<input type="text"/>	Department:	<input type="text"/>
Company Number:	<input type="text"/>	Title:	<input type="text"/>
Country:	<input type="text"/>	Phone:	<input type="text"/>
Address:	<input type="text"/>	Mobile Phone:	<input type="text"/>
Suite:	<input type="text"/>	Other Phone:	<input type="text"/>
City:	<input type="text"/>	Fax:	<input type="text"/>
State/Province:	<input type="text"/>	Pager:	<input type="text"/>
Zip/Postal Code:	<input type="text"/>	Do Not Use?:	<input type="checkbox"/>

**Select Company**

**Custom Fields (0)** Notes

There are no custom fields for this contact.

Save and Add Save Cancel

Once done, click on **Save** or **Cancel**

**Navigation** - From the Global Tabs click on Contacts\Look up Company\click on Contact or newly created Contact

Contact Details **1**

**Contact Information**

Name:	Annie Hiatt	Primary Contact?:	No
Company:	NABHOLZ CONSTRUCTION CORPORATION	Email:	Annie.Hiatt@nabho...
Company Number:	0100337302	Title:	
Department:		Phone:	
Country:		Mobile Phone:	
(view map) Address:		Other Phone:	
Suite:		Fax:	
City:		Pager:	
State/Province:		Username:	[Edit]
Zip/Postal Code:		Do Not Use?:	

Buttons: **Create User** (highlighted), Message History, Edit, Copy, Delete, Print

Annotation: Click on **Create User** (with red arrow pointing to the button)

Custom Fields (0) | Notes (0) | Bidding (1) | Construction Codes (0) | Documents (0) | Forms (0) | Processes (0) | Projects (0)

There are no custom fields for this contact.

Add New User **2**

Complete required information.  
Use Email Address for Username

**Member Profile**

* First Name	Annie	* Company	NABHOLZ CONSTRUCTION CORPORATION
* Last Name	Hiatt	* Email Address	Annie.Hiatt@nabhoitz.com
* Username		Access Expires	<input type="text"/> <input type="calendar"/>
* License Type Contracted License <input type="checkbox"/>		Hide in Global Directory	<input type="checkbox"/>
Require Single Sign On	<input type="checkbox"/>		

**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.

Buttons:  Notify user that he/she has been added, **Save**, **Cancel**

Annotation: Red arrow pointing to the Username field with text: Use Email Address for Username

**Note:** Once the user account is created, you will need to add them to necessary projects and roles

99 - Access External	Limited document permissions for External Users
99 - Access External Consultant	Limited document permissions for External Consultant Users
99 - Access External Contractor	Limited document permissions for External Contractor Users
99 - Access RO	Read only access for document folder permissions
Member	All users in Account - no permissions granted. Do not delete/edit this group

Once done, click on **Save** or **Cancel**

- Locked Accounts – Accounts will automatically reset after 30 minutes, or you can go to users account and click on reset password.
- **1** We have two URL Links for eBuilder
  - Campus Employees <https://app.e-builder.net/sso/universityofmissourisystem>
  - Vendors <https://app.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>
- User can't see a project – may not be a participant on the project
- **2** When adding a new user get an error message – Username Already Exists
- Rename Users – only eBuilder Tech Support has this ability

## **2** Add New User

**Error: Invalid Data**  
Review all error messages below to correct your data.

**Member Profile**

* First Name	<input type="text" value="Bill"/>
* Last Name	<input type="text" value="Copeland"/>
* Username	<input type="text" value="bcz2k@umsystem.edu"/> <small>The username you selected already exists. Please choose another and try again.</small>
* License Type Contracted License	<input type="checkbox"/>

## **1** Login Screen for Consultants and Contractors



If campus staff see this login screen, either they have the incorrect URL or SSO is turned off.

The End  
Questions?