

Quick Start Guide For Company Admins

An Introduction To Implementing MasterLibrary™ Software at Your Organization

Hi project team member and welcome to the growing family of MasterLibrary™ software users.

As a new MasterLibrary™ (ML) Company Admin, you will have a critical role in successful software implementation at your firm.

The information in this *Quick Start Guide* will help you guide your team to fast, efficient software implementation.

Thanks in advance for your attention. We look forward to helping you meet the needs of this important new role.

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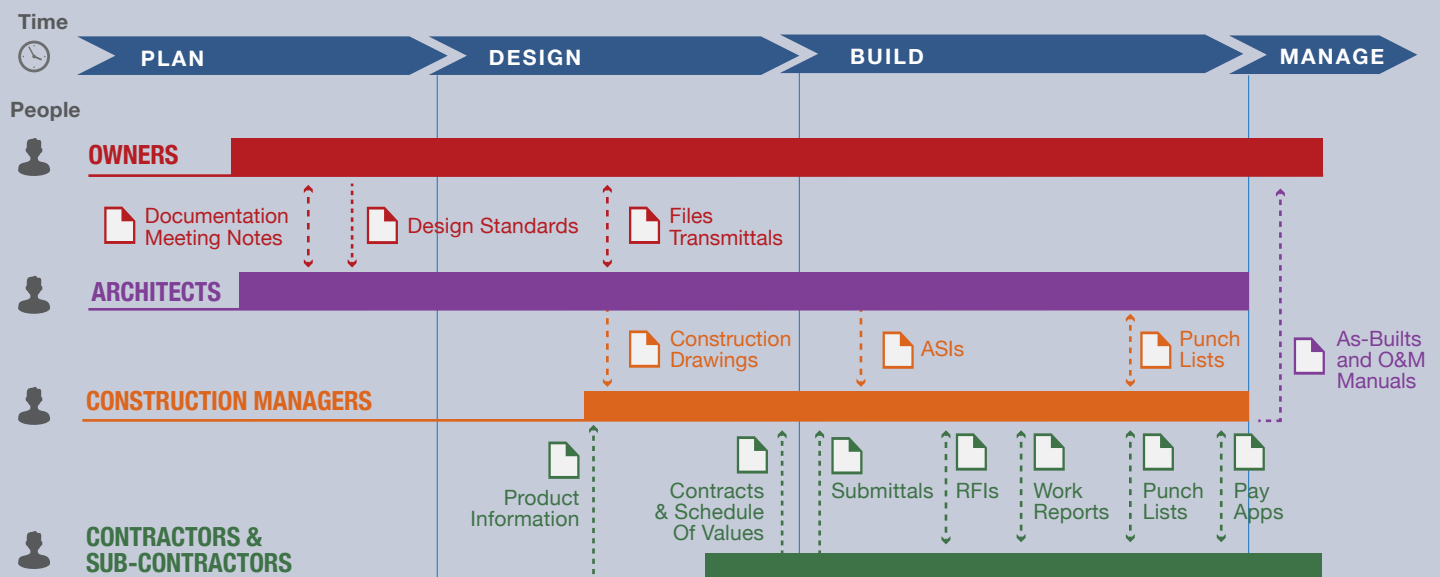
Project Flow & Documentation

MasterLibrary™ software was designed around the needs of construction professionals just like you.

It uses industry-standard processes and documents you already know—RFIs, Submittals, Punch Lists, etc.—and moves them to the cloud.

The result is real-time collaboration among all team members that reduces project admin time, improves efficiency and increases accountability.

Traditional Model without Construction Management Software



The simplified view of the construction project process above shows the key **people** and **paperwork** involved in each **phase**.

For simplicity, not every procedure and type of document with which you routinely interact is shown but most major ones appear, such as **Submittals**, **RFIs**, and **Punch Lists**.

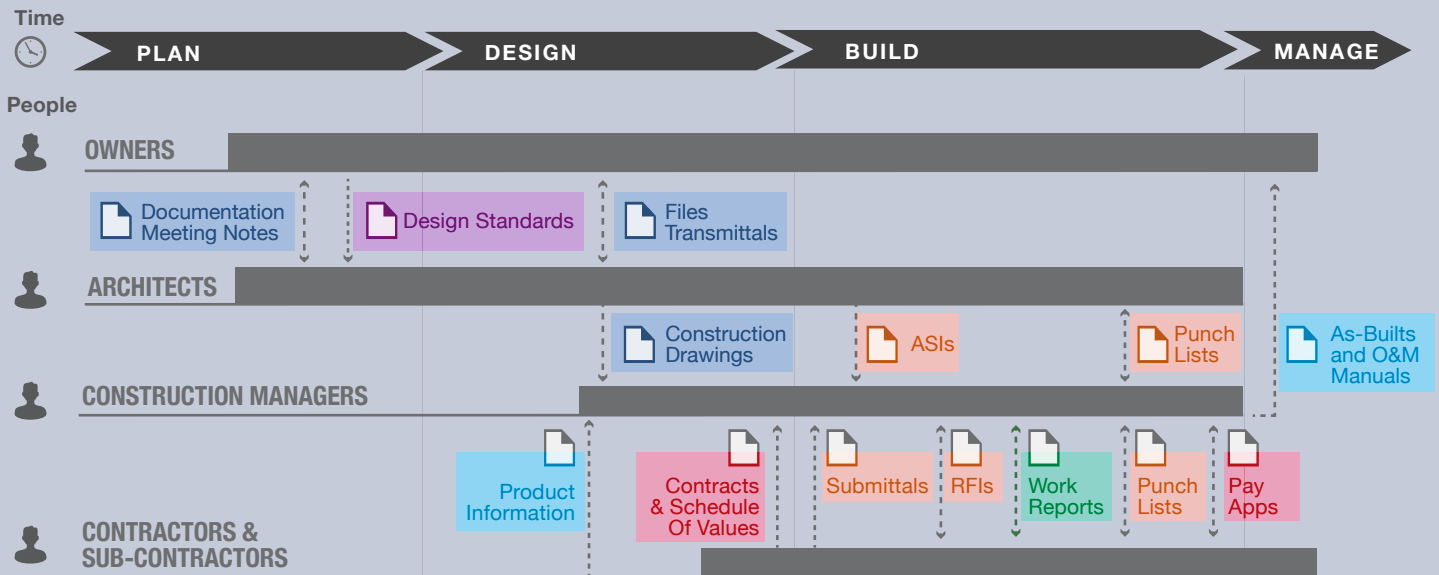
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Project Flow & Documentation (cont.)

Traditional Model with MasterLibrary™ Software

That same people and documents are involved in each phase of the process, but processes and paperwork are handled by the software instead of manually and via hybrid systems (i.e., Excel spreadsheets, file FTP sites, etc.).

The color of the document type shown in the flowchart corresponds to a MasterLibrary™ module listed below.



MasterLibrary™ Software Modules & Tools

PROJECT MANAGEMENT (PM)

- Files
- Drawings/Specs
- Meeting Notes
- Lists
- My Action Items
- Tasks
- Activities
- Correspondence
- Memos
- Transmittals
- Estimates

CONSTRUCTION ADMIN (CA)

- Architect Supplemental Instructions (ASI)
- Requests for Information (RFI)
- Submittals
- Field Observations
- Punch Lists

CONTRACT MANAGEMENT (CON)

- Contracts
- Schedule of Values
- Work Orders
- Field Orders/RFPs
- Proposals
- Change Orders
- Pay Apps

CONSTRUCTION MANAGEMENT (CM)

- Work Reports
- Scheduling
- Safety Audit

DESIGN REVIEW (DES)

- Design Reviews

BINDERS (BND)

- Electronic Facility Records (EFR)/Binders

How The Software Works

As the Company Admin, you play an especially important role in smooth, efficient implementation of MasterLibrary™ software at your firm. Here are some key concepts to understand as you get started.

- MasterLibrary™ stores **construction project data** safely and securely in **“the cloud.”**
- Authorized team members can access project data anywhere at anytime via a web-enabled device such as a tablet or smartphone.
- Architects, Construction Managers, Contractors and Owners have **different access** and **authorization** levels that are controlled by Company Admins like yourself as well as Project Admins on a per-project basis.
- The software is easy to use as it’s based on **industry-standard processes** and **documents** team members already know.



People



Just like the process you use now, internal and external project team members will have different access and approval levels in MasterLibrary™ based on responsibilities.

A typical **project team** would include the following organizations and its representatives:

1. **Construction Managers:** Project Admins and Managers, Engineers, Construction Managers
2. **Architects:** Company and Project Admins, Architects, and Engineers
3. **Contractors:** Company Admin, Prime and Sub-Contractors
4. **Owners:** Owners Rep, Facility Managers, Plan/Design/Construction (PDC) Department Managers and Staff

Paperwork

SUBMITTALS

RFIs

FIELD ORDERS/RFPs

PUNCH LISTS

While MasterLibrary™ software has a wide range of capabilities, our team will initially focus on the following types of construction paperwork and related processes that will have the fastest ROI for your firm and clients:

1. **Submittals:** Initiated by Contractors and sent to either CMs or Architects for review. Copies to all appropriate team members.
2. **RFIs:** Contractors initiate and send to either CMs or Architects/Engineers (A/Es) who provide clarification.
3. **Field Orders/RFPs:** Initiated by A/Es or CMs upon site inspections to document Contract status.
4. **Punch Lists:** CM or Architect prepares the punch list for action by the Contractors and Sub-Contractors. Punch lists can be completed on site in real time via web-connected tablet.



Create, process and approve online in real time.

Access Privileges

In addition to the 4 user types based on profession, there are 3 different levels of access that can be granted to MasterLibrary™ modules and tools.

1. **Company Admins:** There are two kinds of Company Admins, **Subscriber** and **Non-Subscriber**.
Subscriber Company Admins are “super users” with access to all tools and permission settings. They grant admin privileges for selected modules to **Non-Subscriber Company Admins** at companies to affiliate with for a project.
See the next page for more about Company Admins.
2. **Project Admins:** These internal users control the project team and access privileges. They are the only Admins who can add Users to a Project Team.
3. **Project Team Members:** Internal and external users with access and authorizations set on a per-project basis.

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Role	Subscriber?	Access
Company Admins	yes	unlimited for all projects
	no	limited for specific projects
Project Admins	yes	unlimited for specific projects
Project Team Members	doesn't matter	limited for specific projects

Subscriber vs. Non-Subscriber Company Admins

There are two types of Company Admins, both having key roles at their respective firms for smooth MasterLibrary™ implementation:

1. **Subscriber Company Admins** are those from the company paying MasterLibrary's subscription costs. While this is typically an Architect or CM firm, it can also be an owner Plan/Design/Construction (PDC) department or a contractor.
2. **Non-Subscriber Company Admins** are from outside companies that aren't paying subscribers. Non-Subscriber Company Admins capabilities are limited to managing Users at their company.

Limited Non-Subscriber Tool Access

Access to MasterLibrary™ modules and related tools by Non-Subscriber Company Admins is limited by the Subscriber Company Admin, who has access to all tools and modules included in the paid subscription.

Next Steps For Company Admins

Subscriber Company Admins set up initial accounts and access privileges for Non-Subscriber Company Admins who are then responsible for getting their own team member accounts setup.

First Steps for each Admin type appear in this guide:

Subscriber Company Admins	10
(subscribing account)	
Non-Subscriber Company Admins	14
(external free accounts)	

Getting Familiar With MasterLibrary™

Before you dive into the first Company Admin steps outlined in this guide, now is a good time to log into the software to get acquainted with the major screens, tools and resources available. You will need:

- Your access credentials as received via email
- The MasterLibrary™ *Getting Started* guide (PDF) that all user's will receive prior to their first software training session.

Login and Update Your Public User Profile

1. Open the *Getting Started* PDF.
2. Go to page 7 of the PDF.
3. Follow the instructions in the *Getting Started* guide through page 11 (*Check Online Support Options*).

Note that all users will have this same basic familiarity with the software when they attend their first training session.

4. Don't log off the system as shown on page 12 of the *Getting Started* guide. Instead, select **Projects** at the upper left of the toolbar to display your Dashboard view of Projects to which you have been granted access.

Subscriber Company Admins: Go to page 10

Non-Subscriber Company Admins: Go to page 14

The *Quick Start Guide For All Users* familiarizes new users with the software before their first training session.

1. Login and Update Your Public User Profile



A. Log into MasterLibrary™ Software.

1. Select the link from the MasterLibrary™ email invitation link to display the login screen.
2. Use the access credentials to log into the system for the first time. The software will open and your personalized **Dashboard** will be displayed.

B. Update your Profile.

1. Select your **User Name** to the right of the top blue

Quick Start Guide For All Users

An Introduction To Implementing MasterLibrary™ Software at Your Organization

Hi project team member, and welcome to the growing family of MasterLibrary™ Software users.

This *Quick Start* guide provides a brief overview of the **people**, **processes** and **paperwork** that will be automated by the software.

Please take a few minutes to read this guide **prior** to your first MasterLibrary™ training session so you and the rest of your team can hit the ground running.

Thanks in advance for your attention. We look forward to helping you reduce project admin times, while increasing accountability among all project team members.

Subscriber Company Admins: First Steps

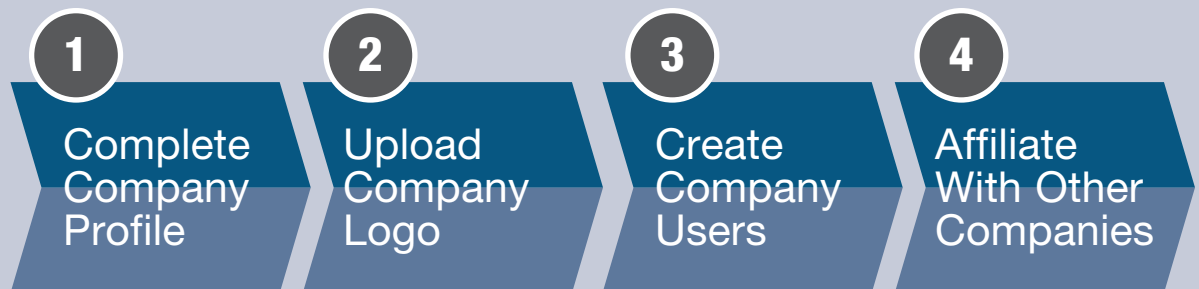
Note First Steps for **Non-Subscriber Company Admins** appears on **pg. 14** of this guide.



*Company Admin
module icon*

Subscriber Company Admins need to complete the following four steps using tools from the **Company Admin** module (*estimated completion time*):


1. Complete your Company Profile. (*3 minutes*)
2. Upload your Company logo. (*1 minute*)
3. Create New Users for your Company. (*5 minutes*)
4. Create Affiliations with other Companies with which you will work. (*5 minutes*)



Procedures for these steps are summarized on the following pages. To expedite completion, have the following materials available from your local desktop as you start the procedure:

- **Company contact information** including address, phone no., web address.
- **Company logo** in JPG or GIF format. Optimal display size is 150x50.
- A list of **project team members** from your company including names and email addresses.
- A list of **external companies** with which you will want to affiliate. (If the desired external company is already a MasterLibrary™ user, they'll automatically show up in a drop-down menu during step 4.)

Subscriber Company Admins: First Steps (cont.)

Note: These *Quick Start* pages are procedural overviews. Select the Help  icon at any time to display an index of online documentation.



*Company Admin
module icon*

From the Project Dashboard view, select the **Company Admin** icon to the upper right of the screen. (This icon is only displayed if you have Company Admin privileges.)

The Company Admin screen will be displayed where you can access the commands shown for each step, all of which follow the same basic procedure:

1. Enter the requested information.
2. Select the Save button at the bottom of each screen.

You will be returned to the previous screen which now shows the newly entered information. (Later on you'll learn about the Draft mode of some screens but you don't need to worry about that now.)

Here are the four required Internal Company Admin steps to get started using MasterLibrary™ software.

1. Complete Company Profile

- **Objective:** Add information to your ML public Company Profile that all users see including those from other companies.
- **Command:** Edit Company Information

2. Upload Company Logo

- **Objective:** Associate a graphic logo with your account. The logo is displayed in the page header of all project and admin pages for your company.
- **Command:** Edit My Company Logo

— *continued* —

3. Create New Company Users

- **Objective:** Create individual user accounts for internal team members.

- **Command:**

[Manage Users in My Company \(Employees\)](#)

The minimal data required to create a user account is first and last name, and company email address. Other fields such as titles and phone numbers can be added by the user when they first log into the system with the *Getting Started* guide.

4. Affiliate With Other Companies

- **Objective:** Create Affiliations with external Companies that will be part of your project team (e.g., Architects, CMs, Contractors).

- **Commands:**

[Look for other Companies Using MasterLibrary](#)

There are a number of ways to affiliate with an external company based on if the external company has a current MasterLibrary™ account (paid or free):

- **If yes,** the company name will appear in a pre-populated list from which you can select to affiliate.
- **If not,** a new external company account will need to be created by either the firm's designated External Company Admin, or the Internal Company or Project Admin.

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To Affiliate With External Companies

From the Company Admin main screen:

1. Select [Look for other Companies Using MasterLibrary](#).

A list of companies already registered in MasterLibrary will be displayed, sorted alphabetically.

If the Company with which you want to affiliate **is listed**:

2. Select its **Create Affiliation** link in the **Affiliate** column.

The external company is now affiliated with yours.

You can immediately add Users from that external company to your Projects (as long as desired users have active accounts).

If the external company **is not listed**, here are options available to Internal Company Admins:

1. Ask a designated External Company Admin to create the company's own free account via the ML Login Page > [Create Free Team Member Account](#)

The External Company Admin can then create other Users within their company, and affiliate with your company as per the steps listed above

2. Create the external company yourself via the [Setup a new Company that I will Manage](#) Company Admin tool.

You will then be in control of their account and have the option to create other Users within their company via [Manage Companies that I have Setup](#) tool.

Note that you can hand over management of an Internally Managed External Account to an External Company Admin at any time later in the project.

3. Create an external company account from within the specific Project as described in the *Project Admin Quick Start* guide.

Non-Subscriber Company Admins: First Steps

Note First Steps for **Subscriber Company Admins** appears on **pg. 10** of this guide.


Non-Subscriber Company Admins need to complete the following three steps using tools from the **Company Admin** module (*estimated completion time*):

1. Complete your Company Profile. (*3 minutes*)
2. Upload your Company logo. (*1 minute*)
3. Create New Users for your Company. (*5 minutes*)



Procedures for these steps are summarized on the following pages. To expedite completion, have the following materials available from your local desktop as you start the procedure:

- **Company contact information** including address, phone no., web address.
- **Company logo** in JPG or GIF format. Optimal display size is 150x50.
- A list of **project team members** from your company including names and email addresses.

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Non-Subscriber Company Admins: First Steps (cont.)



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Here are the four required Internal Company Admin steps to get started using MasterLibrary™ software.

1. Complete Company Profile

- **Objective:** Add information to your ML public Company Profile that all users see including those from other companies.
- **Command:** [Edit Company Information](#)

2. Upload Company Logo

- **Objective:** Associate a graphic logo with your account. The logo is displayed in the page header of all project and admin pages for your company.
- **Command:** [Edit My Company Logo](#)

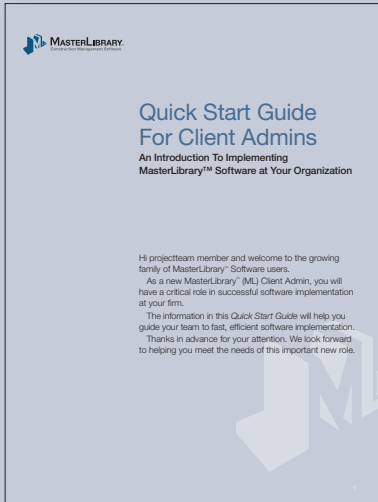
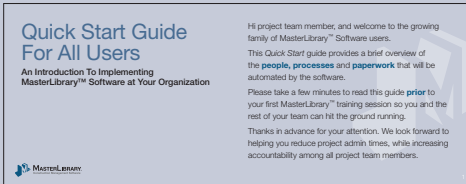
3. Create New Company Users

- **Objective:** Create individual user accounts for internal team members.
- **Command:** [Manage Users in My Company \(Employees\)](#)

The minimal data required to create a user account is first and last name, and company email address. Other fields such as titles and phone numbers can be added by the user when they first log into the system with the *Getting Started* guide.

Resources For Successful Implementation



Be sure to check the following online resources within MasterLibrary™ Software that make learning easy:



Help icon



New Features icon

- **Getting Started Guide:** Distributed to all new software users with their access credentials, this PDF provides a basic overview of the software including login and exploration instructions.
- **Quick Start Guides:** Two kinds are available:
 - **People:** General Users, Company and Project Admins
 - **Processes:** Submittals, RFIs, ASIs, Contracts (including SOV), Meeting Notes and others.
- **Help pages:** Select the **Help** icon  to display a detailed index of available documentation. *(You can find answers to 90% of your questions here.)*
- **Request Help:** If you still have questions, select Request Additional Help at the top of the Help page for a request form which will typically be answered within 2 hours.
- **LinkedIn Users Group:** Join fellow ML users in this forum that fosters dialogue and practical use.
- **New Features Index:** We are constantly adding new features and improving existing ones to better meet your needs. Click on the New Features icon  to see a chronological index of new MasterLibrary™ features. *(You can also sign up for email alerts when new features are added.)*
- **Phone Support:** Free U.S.-based phone support is available at **585.270.6676**.

