

# Quick Start Guide For All Users

An Introduction To Implementing  
MasterLibrary™ Software at Your Organization

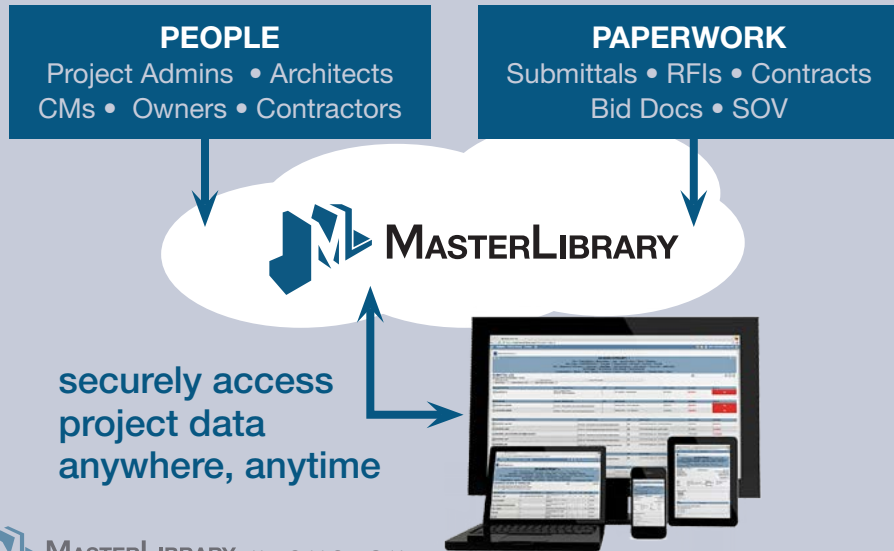
Hi project team member, and welcome to the growing family of MasterLibrary™ software users.

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.

# How The Software Works



MasterLibrary™ software stores **construction project data** safely and securely in **“the cloud”** which authorized team members can access 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 Project Admins.

The software is easy to use as it's based on **industry-standard processes** and **documents** you already know.

No matter what role you play on a project team, you should understand the few key concepts discussed in this guide.

# 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, 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

FIELD ORDERS/RFPs

RFIs

PUNCH LISTS



Create, process and approve online in real time.

While MasterLibrary™ software has a range of capabilities, most users initially focus on the following types of construction paperwork and related processes that typically have the fastest ROI for their firm and its clients:

- **Submittals:** Initiated by Contractors and sent directly to the CM and Architect for review.
- **RFIs:** Initiated by Contractors and sent to the CM for review and response.
- **Field Orders/RFPs:** Initiated by A/Es or CMs upon site inspections to document Contract status.
- **Punch Lists:** Prime Contractor prepares for A/E review. Can complete on site in real time via web-connected tablet.

# Access Privileges

Role	Subscriber?	Access
<b>Company Admins</b>	yes	unlimited for all projects
	no	limited for specific projects
<b>Project Admins</b>	yes	unlimited for specific projects
<b>Project Team Members</b>	not applicable	limited for specific projects

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 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 other companies to affiliate with for a project.

**2. Project Admins:** These internal users control the project team and access privileges.

**3. Project Team Members:** Internal and external users with access and authorizations set on a per-project basis.

# Before You Start



By the time you receive your email introduction, your Project Admin will have completed these three one-time Account setup steps.

If you received an email inviting you to become a MasterLibrary™ user, it means your Company Admin has already completed the following account set-up steps:

- 1. Created Company Account:** An account for your firm has been created that all MasterLibrary™ users can access.
- 2. Entered Internal Users:** A user account with your name and basic contact information has been created.
- 3. Added External Companies:** Accounts for external companies including Architects, CMs, Contractors and Owners have been set up. The external Company Admin is responsible for setting up its own team member accounts.

# 1. Login and Update Your Public User Profile

## Personalized Dashboard

The screenshot shows the MasterLibrary personalized dashboard. At the top, there is a navigation bar with 'Projects', 'Facility Records', and 'Binders'. To the right, it displays 'User Name (Log Off)'. Below this is a 'My Dashboard' section. On the left, there is a 'Personal Tasks' section with a 'Task () + show' button. Below that are search filters: '- Select Item Type -', '- Select Project -', and '- Select Email Sender -', along with a 'Mark all Read' button. A search bar is also present. Below the search filters is a table with columns 'From', 'Subject', 'Type', and 'Date Sent'. At the bottom left, there are social media icons for LinkedIn, Twitter, and YouTube. At the bottom right, there is the MasterLibrary logo and the tagline 'The Smarter Way To Build.'.

## 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 toolbar. The **Edit Profile** screen will be displayed, where you can change your password and edit basic user information that is shared with other team members.
2. Select **Update Profile** to save your changes. Your Dashboard will be displayed.

## 2. Explore The Software Using The Test Project

### Project Summary

Projects Facility Records Binders User Name (Log Off)

Select Project Creator View: **Active** Completed Projects

Click column header to sort

#	Project	Creator
100	0000-000 Company Test Project	MasterLibrary™ Subscribing Company

MASTERLIBRARY. Construction Administration Software The Smarter Way To Build.™

### A. Access The Test Project Account

With the Dashboard displayed:

1. Select **Projects** at the left of top blue toolbar.  
A **Project Summary screen** showing projects to which you have access will be displayed.
2. Select **0000-000 Company Test Project** from the Project field of the Summary screen.

The Sample Project Summary screen will be displayed as shown on the next page.

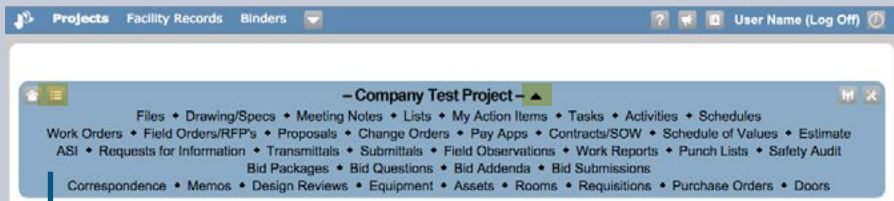
Take a moment to become familiar with the tools available from the Project Summary screen.

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## 2. Explore The Software (cont.)

### Test Project Overview Toolbar & Header



**Module & Tools header.** Appears on all pages for quick tool access. Project Admins control Module availability to users based on role and responsibilities.


 **Header Toggle Arrow** hides/reveals Module header.

 **Project Tools Menu** shows flyout menu of all tools.

## B. Explore MasterLibrary™ Icons


With the Test Project Overview displayed, click or rollover any of the following icons in the toolbar or header:

 **More** to access your Dashboard, user resources, and other MasterLibrary™ information

 **Help**

 **New Features**

 **Contact List**

 **Timesheet**

 **Project Team**

 **Project Admin**

 **Project Tools Menu**

 **Project Home**

Note that you will not have access to all Sample Project modules and tools in your projects. Modules and toolsets such as Project Admin and Contract Management will be limited based on project role.

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## 2. Explore The Software (cont.)

Module toolsets of interest to your firm include:

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### **PM PROJECT MANAGEMENT**

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

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### **CA CONSTRUCTION ADMIN**

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

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### **CON CONTRACT MANAGEMENT**

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

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### **CM CONSTRUCTION MANAGEMENT**

Work Reports, Scheduling & Safety Audit

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### **DES DESIGN REVIEW**

Design Reviews

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### **BND BINDERS**

Electronic Facility Records (EFR)/Binders

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## C. Review Available Modules & Tools

Module toolsets are available from both the Modules header menu and **Project Tools Menu**. 


## 2. Explore The Software (cont.)



Online resources include extensive documentation, help requests, and our LinkedIn Users Group.

### D. Check Online Support Options

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

- **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 users in this forum dedicated to fostering dialogue and practical use.



Of course, you can always call our free U.S.-based phone support at **585.270.6676**.

## 2. Explore The Software (cont.)

### Dashboard


The screenshot shows the MasterLibrary™ software dashboard. At the top, there is a navigation bar with 'Projects', 'Facility Records', and 'Binders'. Below this is a 'My Dashboard' section with 'Personal Tasks'. A search bar is present with filters for 'Item Type', 'Project', and 'Email Sender'. A table with columns 'From', 'Subject', 'Type', and 'Date Sent' is visible. The footer contains social media icons and the MasterLibrary logo with the tagline 'The Smarter Way To Build.'

## E. Log Out of MasterLibrary™ software

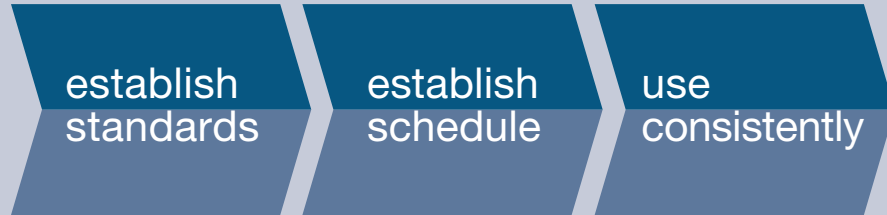
When you are done exploring Modules, toolsets and icons in the Sample Project:

1. Select **(Log Off)** next to your name in the toolbar. You will be logged out of the software and the MasterLibrary™ Login page will be displayed.

We hope you found your first experience with MasterLibrary™ software to be a positive one.

As you get deeper into its use don't forget about the **Help** icon  available on every page, to easily access documentation about procedures, modules and tools.

# Final Thoughts



**Implementation is easier with organizational standards, a rollout schedule and consistent daily use to improve confidence and efficiency.**

Before you go, here are three thoughts to keep in mind as you begin to use MasterLibrary™ software:

- 1. Standards:** Everyone will use the same system in the same way based on documented standards.
- 2. Schedule:** Some company team members have already used the software on real projects. Implementation schedules are based on this experience.
- 3. Consistency:** Use the software daily for at least 30 minutes a day. Take bite-size chunks of project work and move them to the software.

Thanks for reading this guide which we hope you found useful. We look forward to seeing you at training.

# Ideas or feedback?

## Internal Company Contact

- Your Project Manager

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- Your Company Admin

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## MasterLibrary™ Customer Support

585.270.6676, option #3    [support@masterlibrary.com](mailto:support@masterlibrary.com)

