MasterLibrary™
Construction Administration Software

Quick Start Guide For Project 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) **Project 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 project 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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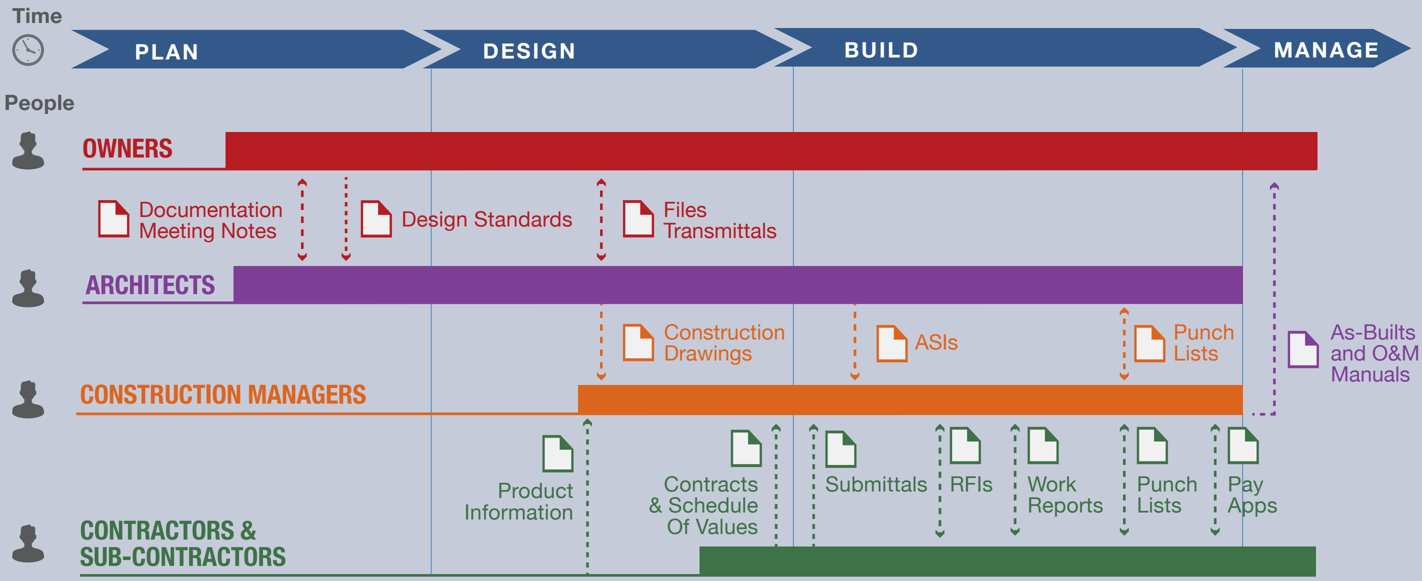
Project Flow & Documentation

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.**

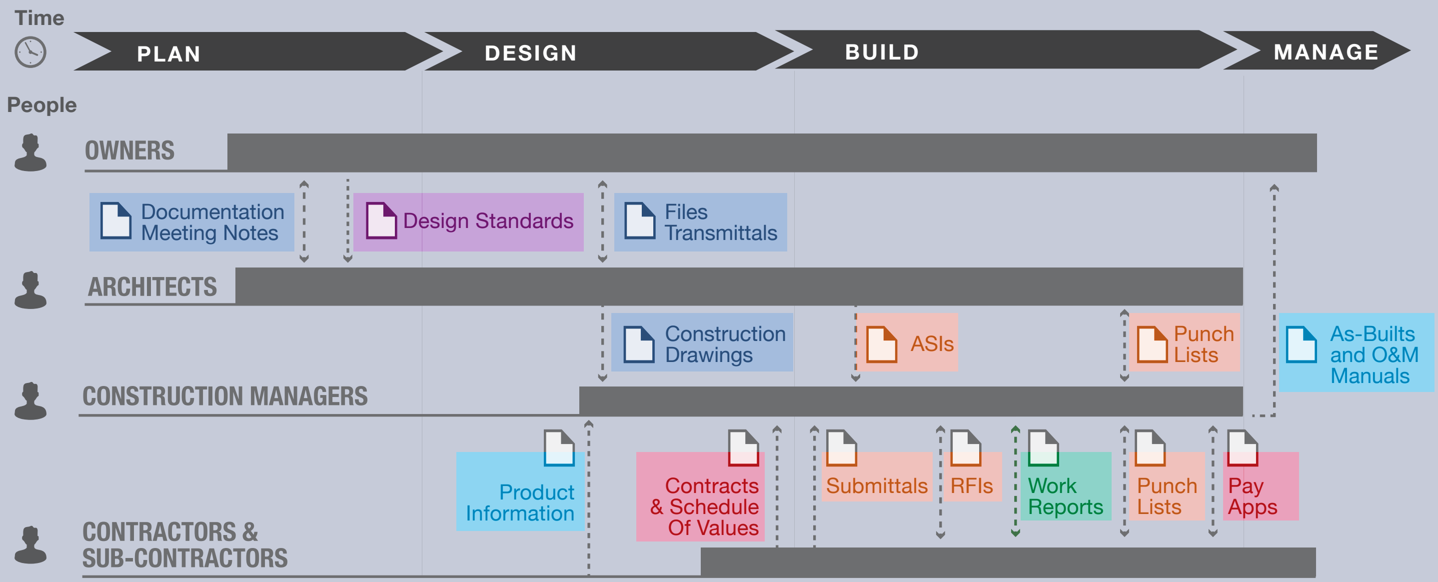
— continued —

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., 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 a Project 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 as well as Project Admins like yourself 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

Create, process and approve online in real time.

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 sent to all appropriate team members creating transparency throughout the Submittal process.
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. Pricing can be obtained and negotiated in real time, linking pertinent ASIs, RFIs and Project Issues to the Change Order process.
4. **Punch Lists:** CM or Architect prepares the punch list for action by the Contractors. Punch lists can be completed on site in real time via web-connected tablet or smartphone.

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 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.
    - **Non-Subscriber Company Admins** are from outside companies that aren't paying subscribers.

    Both types of Company Admins are "super users" within their organizations with the ability to:

    - Create and manage users from their own firms
    - Create accounts for other organizations and enter new users from these entities
    - Affiliate with these other firms

    Access to tools within a project for both Company Admin types are controlled by the **Project Admins** for that project.

    Project Creation rights is the major difference between the two roles. These rights are controlled by the **Subscriber Company Admin** who selects which team members within their firm have permission to create and manage new projects. **Non-Subscriber Company Admins** need to be granted access to a project from the subscribing Project Admin to use MasterLibrary™ tools for a specific project.

— continued —

2. **Project Admins:** These internal users control the project team and access privileges. They are responsible for adding Users to a Project Team.
3. **Project Team Members:** Internal and external users with access and authorizations set on a per-project basis.

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.

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

Getting Familiar With MasterLibrary™

Before you dive into the **Project Admin** first six 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™ *Quick Start Guide For All Users* (PDF) that all users will receive prior to their first software training session.

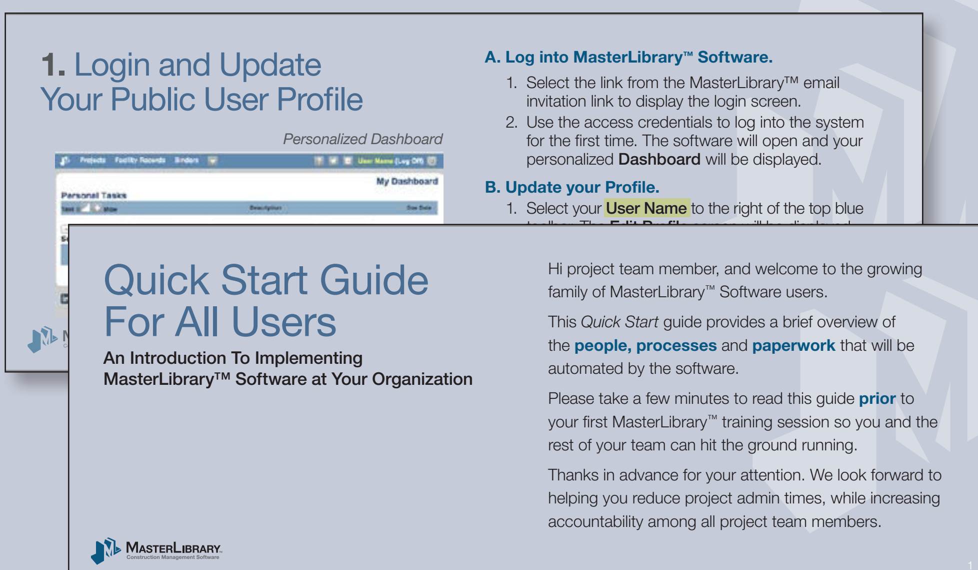
Login and Update Your Public User Profile

1. Open the *Quick Start Guide For All Users* PDF.
2. Go to page 7 of the PDF.
3. Follow the instructions in the *Quick Start 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 *Quick Start 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.

The **Project Admin 6 Steps To Get Started** follows.

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

Personalized Dashboard

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.

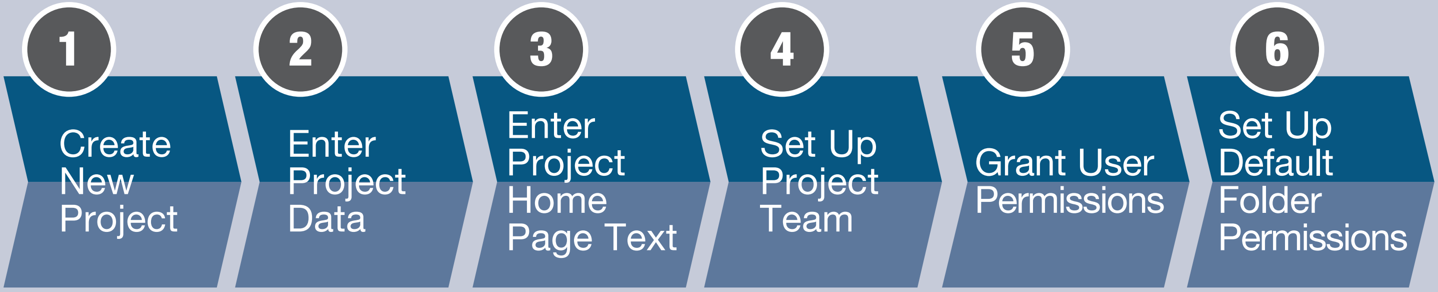
Please take a few minutes to read this guide **prior** to your first MasterLibrary™ training session so you and the rest of your team can hit the ground running.

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

Project Admins: Six Steps To Get Started

Project Admins need to complete the following six steps to get started using MasterLibrary™ software *(estimated completion time)*:

1. Create a new Project. *(1 minute)*
2. Enter basic data about the Project. *(3 minutes)*
3. **Optional:** Enter project information (e.g., status update) that will be displayed on the Project home page. *(2 minutes)*
4. Set up the Project Team. *(5 minutes)*
5. Grant User permissions to specific MasterLibrary™ tools. *(8 minutes)*
6. Set Default Folder Permissions. *(2 minutes)*



Procedures for these steps are summarized in this *Quick Start Guide.* To expedite completion, have the following materials available from your local desktop as you start the procedure:

- **Basic Project Data** including name (using your firm's naming standards) and short description of current project status.
- **List of Project Team members,** both internal and external including CMs, Architects, Owner, and Contractors.
- ***Recommended Team Member Permission Settings*** for your organization (separate PDF).

1

Create New Project

Create/Add icon

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

1. Create A New Project

From the Project Dashboard view:

1-1. Select the **Create/Add** icon to the upper right of the screen. (This icon only appears if you are a Subscribing company and have been granted *Add Project* privileges by your Company Admins.)

The **Create Project screen** will be displayed. Note that Project Admins can edit any project data.

1-2. Enter the following basic project information:

- **Project Name** using your firm's naming standards
- **Project Type:** Select from drop-down menu
- **Customer:** Select from drop-down menu which will be pre-populated with a list of external companies with which your company is affiliated. Select **N/A** if the customer does not appear on the drop-down menu.

The software automatically creates a unique project number.

When the fields are entered:

1-3. Select the **Save Information** button.

A project summary screen will be displayed including the software toolbar, icons, and module/toolset header.

— *continued* —

2

Enter Project Data

Project Admin module icon

2. Enter Basic Project Data

From the Project Summary screen:

2-1. Select the **Project Admin** icon to the upper right of the screen. (This icon only appears if you have Project Admin privileges.)

The **Project Admin screen** will be displayed where you can control many project-specific tools. You will focus on the first set of tools—**Project Setup**—for many of the procedures outlined in this Quick Start guide.

2-2. Select the Manage Project Information command.

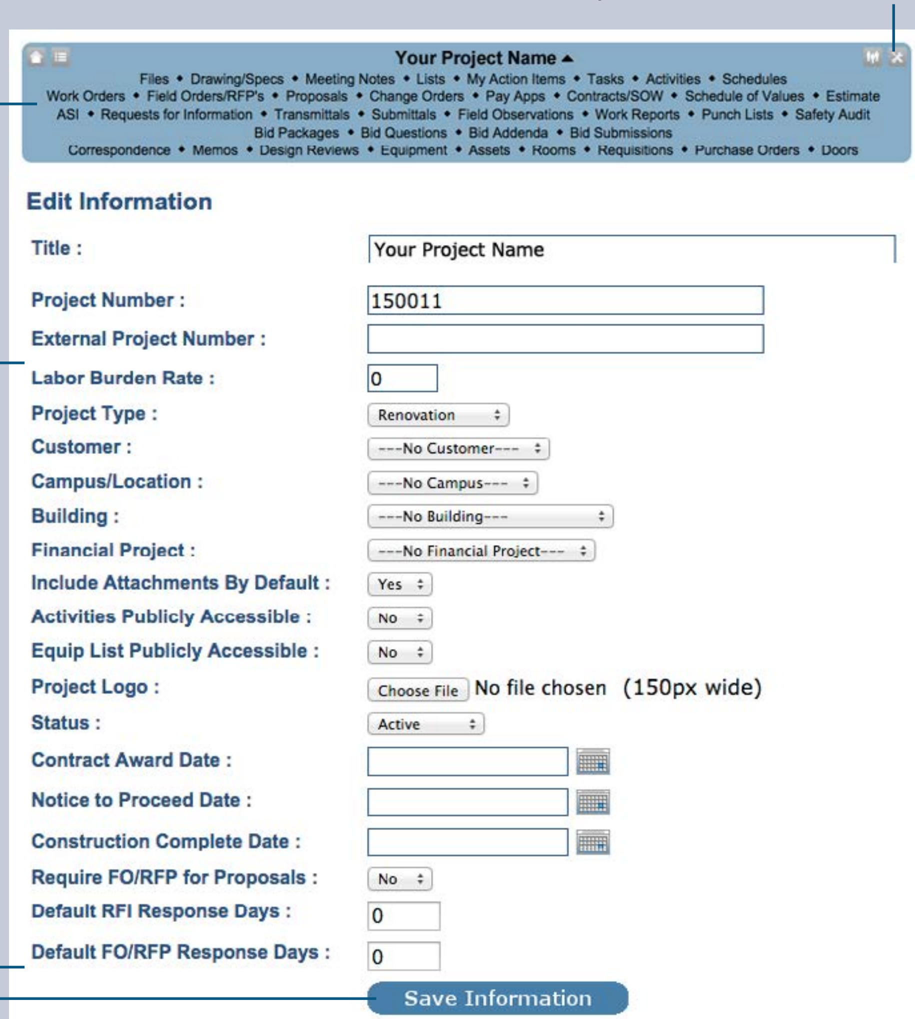
The **Project Edit Information** screen will be displayed.

Project Admin module icon

available Module Toolsets

Project data fields

Save Information button



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2 Enter Project Data

2-3. Complete the following **Edit Information** fields leaving the others to their default settings:

- **Financial Project:** Select from drop-down menu. (Select **No Financial Information** if appropriate project does not appear on the menu.)
- **Project Logo:** Optional. Use dialogue window to navigate to desired JPG or PNG file.
- **Contract Award Date:** Enter calendar date
- **Default RFI Response Days:** 7
- **Default FO/RFP Response Days:** 7

Note that you can edit the **Project Name** and **External Project Number** from what was entered during the previous step.

When the fields are entered:

2-4. Select the **Save Information** button.

The Project Administration screen will be displayed.

3 Enter Project Home Page Text

3. Optional: Enter Project Home-Page Text

Project Admins can enter text and graphic content that all project team members will see when they log into that project such as updates and major announcements.

3-1. Select Manage Project Homepage from the **Project Admin** screen to display a screen where content can be entered.

3-2. Select **Save Information** to save your entry.

— continued —

4

Set Up Project Team

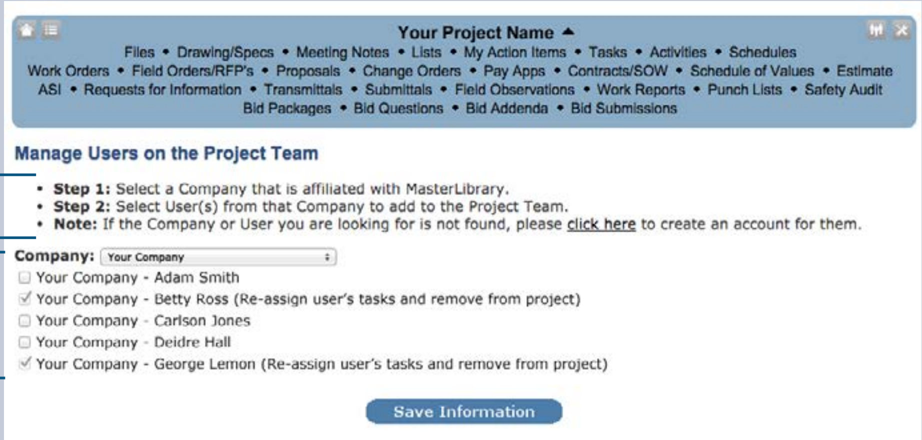
4. Set Up Project Team

From the Project Administration screen:

4-1. Select Manage Project Team from the **Project Setup** tools to display the **Manage Project Team Users** screen.

Directions to add External Company Team Members

Internal Team Members



To assign team members from external companies such as Architects and Contractors to a project, you must first affiliate with their company. Your Company Admin may have already affiliated with external companies for you.

Your company will be pre-selected from the **Company** drop-down menu and employees with MasterLibrary™ accounts will be listed.

Select Internal Team Members

4-2. Select the check boxes next to user names from your company that you want to add to the project team, then select **Save Information.**

The Project Admin screen will be displayed.

4-3. Select Manage Project Team again.

The Manage Project Team Users screen will be displayed with the selected internal users added to the project team.

— *continued* —

4
Set Up Project Team

Select External Team Members

There are a number of factors that effect how to add someone at an external company to your project team:

Factor	Process To Add User step no.
Existing company affiliation on MasterLibrary (ML) software	Select name from **Company** drop-down menu. 4-4
No affiliation but external company is an ML user	**Company Admin** creates affiliation with external company
External company is not a MasterLibrary user	Enter new user information. 4-7
	Notify desired new users at external companies to set up their own free ML accounts.
Note that the first user from a new external company who logs into the project will become that company's Company Admin. This role can be transferred within the organization at anytime.	

Here is the general sequence to use to add new project team members:

4-4. Select the **Company** drop-down menu to see a list of all external companies with which your company is currently affiliated.

If the desired company **appears on the menu:**

4-5. Select the desired company name from the Company drop-down menu.

All the company's MasterLibrary™ users will appear.

4-6. Repeat step **4-2** for the desired external team members, then Save Information

If the desired company **does not appear on the menu:**

4-7. Select the click here link in the Note bullet.

4-8. Enter the desired team member's email address and select **Continue.**

— continued —

4

Set Up Project Team

If the email address entered **is associated** with an existing MasterLibrary™ account, the name and company of the user will be displayed.

4-9. Select **Continue** if this is the correct user. (If this is not the desired user, select the **go back** link to enter a different email address.)

If the email address **is not associated** with a current MasterLibrary™ account:

4-10. Enter the desired team member's first and last name, and company name: then select **Continue.**

The software will automatically:

- Create a non-subscriber account for the company
- Affiliate the new company with your company
- Create a user account based on the information provided in steps **4-8** and **4-10.**
- Send an email to the new user with their access credentials and a link to the project.

To continue adding new team members:

4-11. Select **Click here to add another User** and repeat the procedure on this page.

4-12. Close the window when all users have been added.

5

Grant User Permissions

5. Grant User Permissions

In addition to assigning users access to specific tools, you can also grant other team members Project Admin privileges.

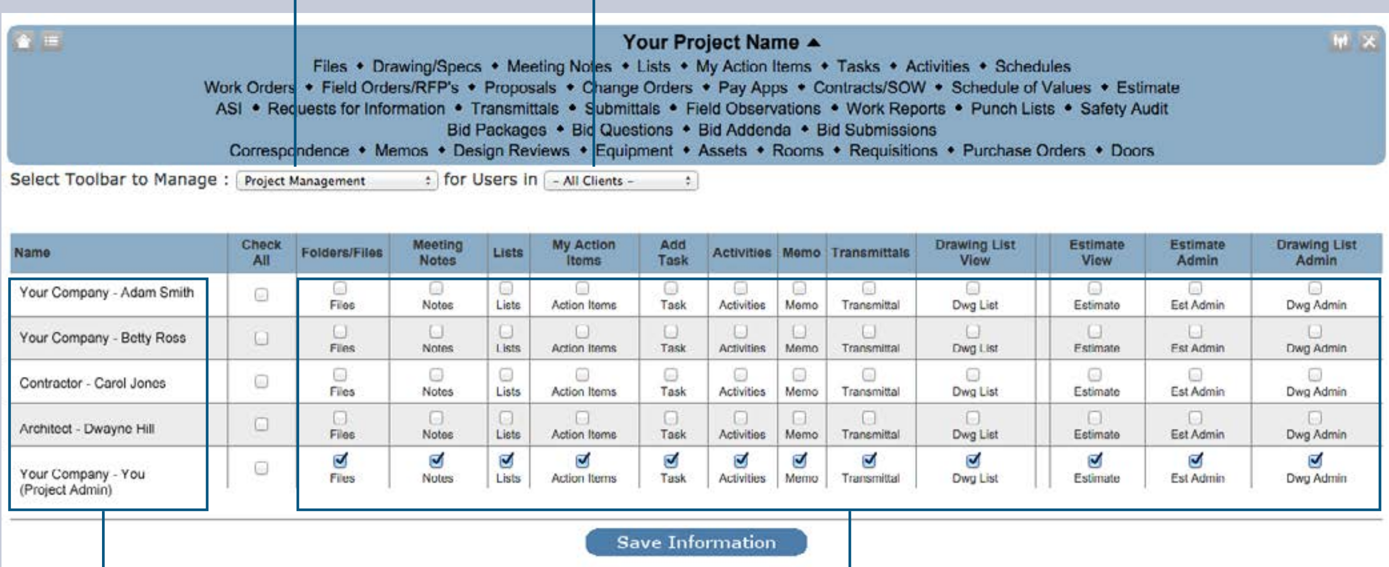
5-1. Navigate to the Project Admin **User Access** section and select Manage Project User Access To Tools.

The **Manage User Permissions screen** will be displayed showing all the tools available in the Project Management module.

By default, the Project Admin is granted access to all tools in all modules to which the company subscribes.

Module Toolsets drop-down menu

Company drop-down menu



project team members

module tool permission settings

— continued —

5

Grant User Permissions

5-2. Select the check boxes next to the tools to which you want the user to have access.
(Selecting **Check All** will select all tools for a user.)

5-3. Select **Save Information.**

5-4. Select the **Module Toolset drop-down menu** to display a list of all modules to which your company has access. In addition to Project Management, this could include:

- Construction Management
- Construction Administration
- Contract Administration
- Equipment Management
- Door Hardware
- Design Review
- Bid Management
- Project Administration
- Files & Folders (Binders)

5-5. Repeat steps 5-2 through 5-4 for all module toolsets.

See the separate PDF for *Recommended User Permission Settings* for use at your firm.

Note: Use the **Project Administration** tools to grant other team members full Project Admin privileges for this project.

See the separate PDF for *Recommended User Permission Settings* for use at your firm.

6

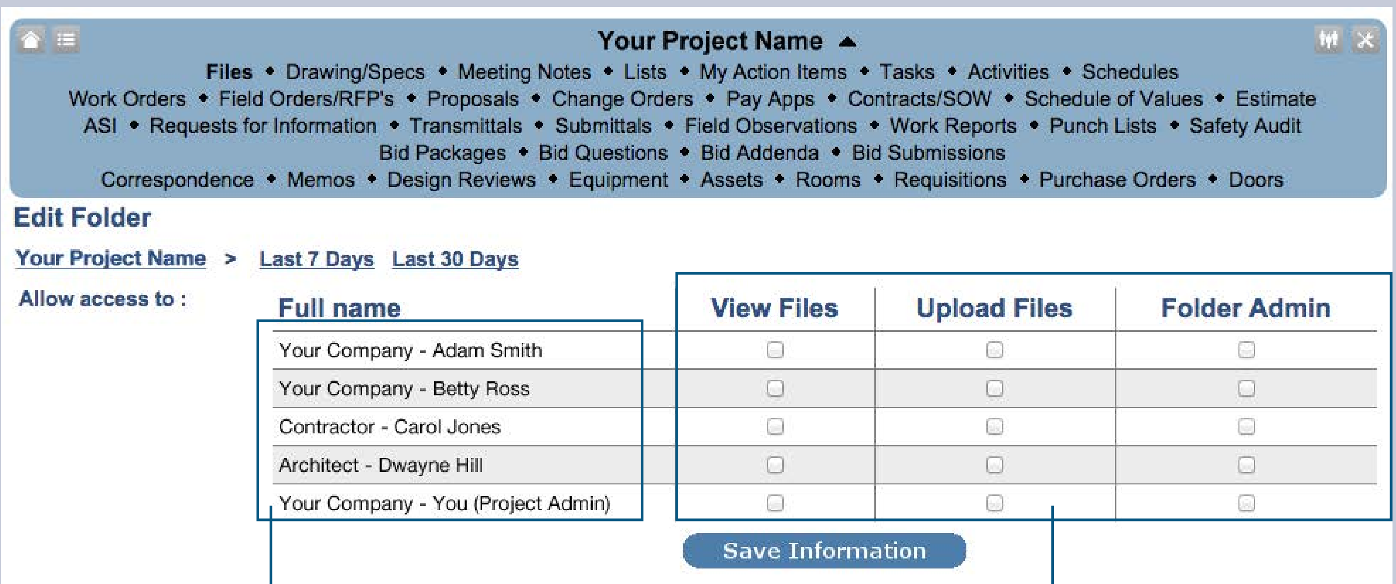
Set Up Default Folder Permissions

6. Set Up Default Folder Permissions

This last initial Project Admin step sets the baseline for users to inherit for access to Files and Folders uploaded to the **Files** tool.

6-1. Navigate to the Project Admin **User Access** section and select Manage Default Folder and File Permissions.

The **Manage Default Folder and File Permissions screen** will be displayed showing View, Upload and Folder Admin tools.



project team members

files & folders permission settings

6-2. Select the check boxes next to the tools to which you want the user to have access. As the Project Admin, you will want access to all three tools.

6-3. Select **Save Information.**

The message “You do not have folders/files. Create a sub-folder or upload a file.” will be displayed because there is nothing uploaded to the Files tool at this time. Access to individual files and folders can be changed at anytime on per-user basis by anyone with Folder Admin privileges.

Next Steps For Your Project

Congratulations on completing these first six steps as a new MasterLibrary™ Project Administrator. We hope you are more comfortable the software's operation than you were when you started this *Quick Start Guide.*

While every project is different, here are some next steps you may want to consider in using the software for your first project:

1. Create folders (e.g., by building or contract) and upload appropriate files using the **Project Management > Files** tool.
2. Enter a welcome message and project status update that team members will see when they log into the project using the **Project Management > Manage Project Home Page** tool. (See step 3 on page 13 of this guide.)
3. Enter **Contracts** and get associated **Schedules Of Values** entered by Contractors for review and approval. See the *Contract Management Quick Start* guide.

Resources For Successful Implementation

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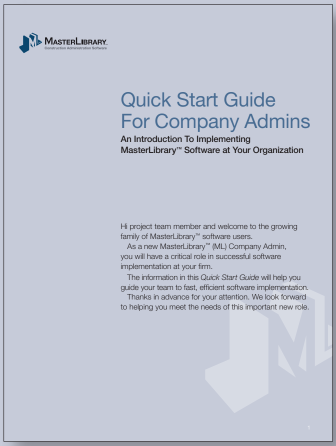
Construction Management Software

1



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1

Help icon

New Features icon

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

- ***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 ML users in this forum dedicated to fostering 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.)
- **Blog:** Contribute to user dialogue about new feature updates, news-to-use and industry trends.
- **Phone Support:** Free U.S.-based phone support is available at **585.270.6676.**