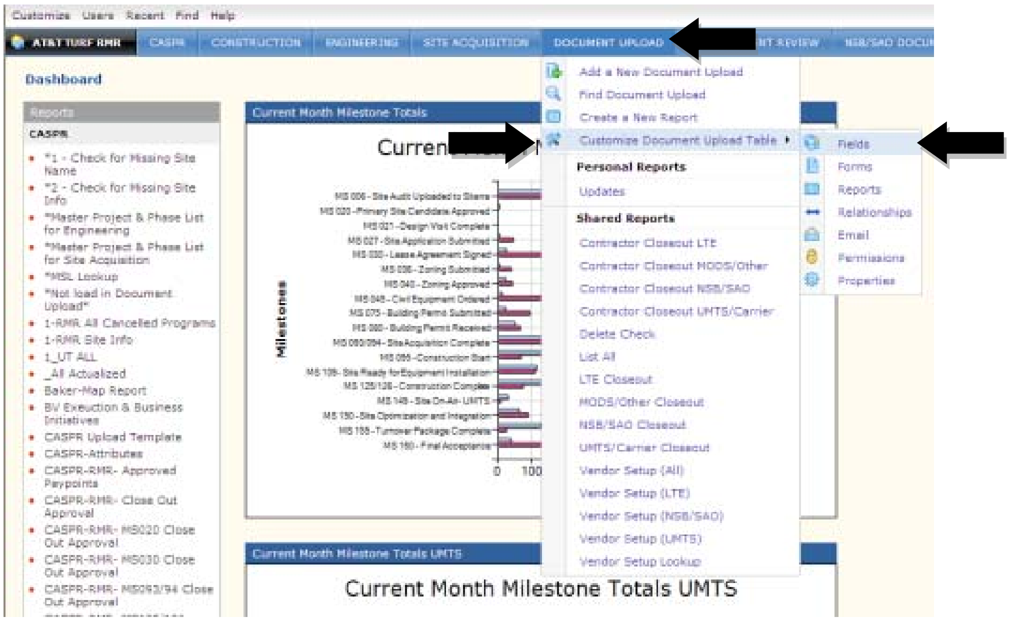
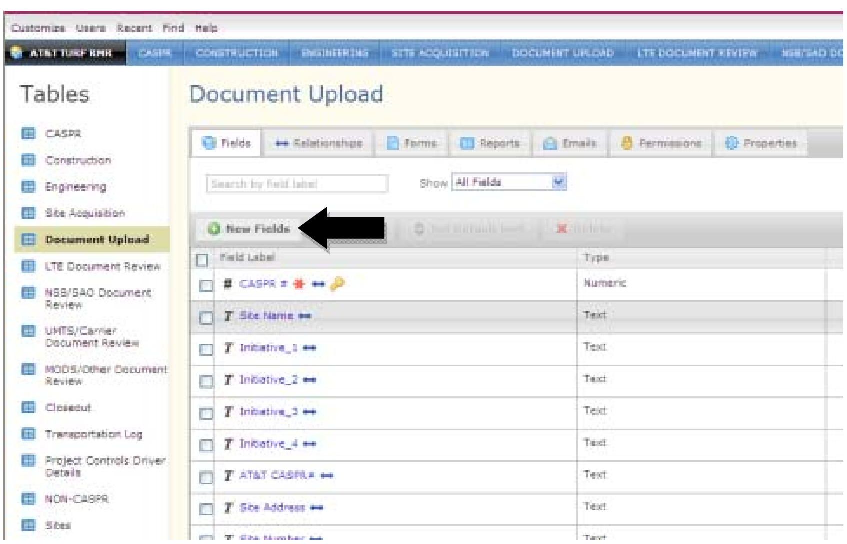
CREATING A NEW CONTRACTOR ACCOUNT

This work instruciton assumes the user has Admin privilege in QuickBase to create new user accounts.

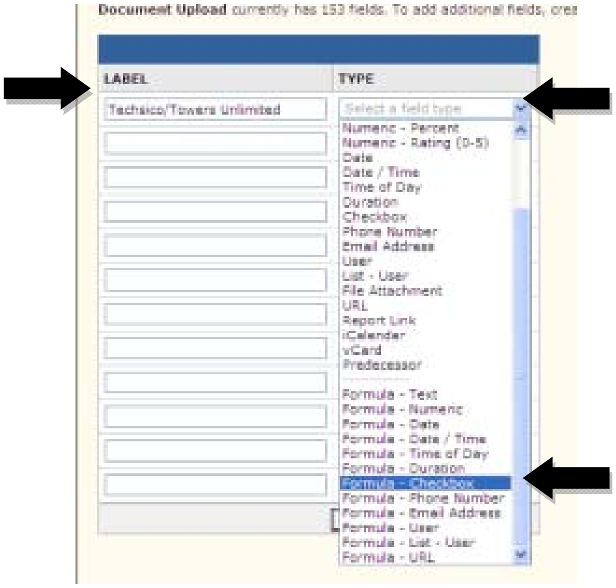
1. The user will click on the Document upload table and drop down to Customize Document Upload table and select Fields. The locaiton of the Document Upload table may vary from the screen shot. If the user does not see the table click on the far right table with etc as part of the table name. The table should appear in the list of addatioanl tables.



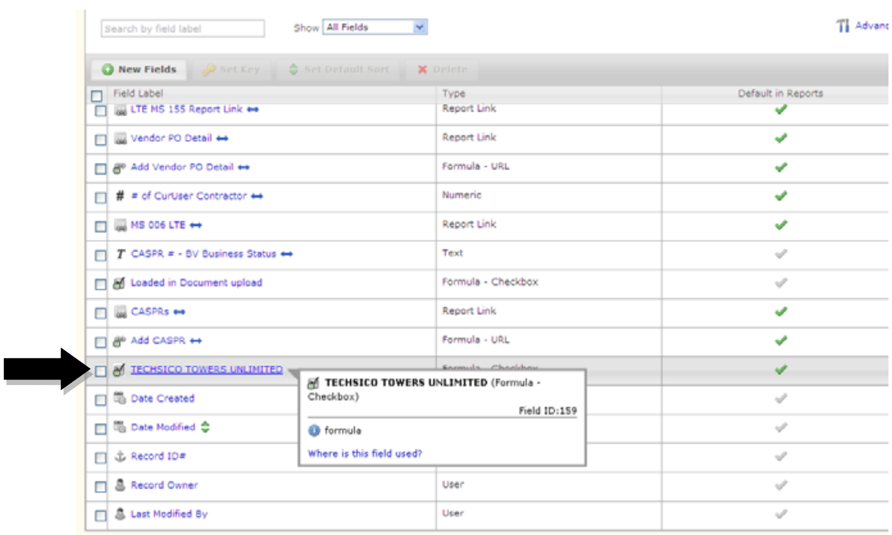
2. Click New Field.



3. Enter the Contractor Company's name under Label. Under Type select Formula-Checkbox.



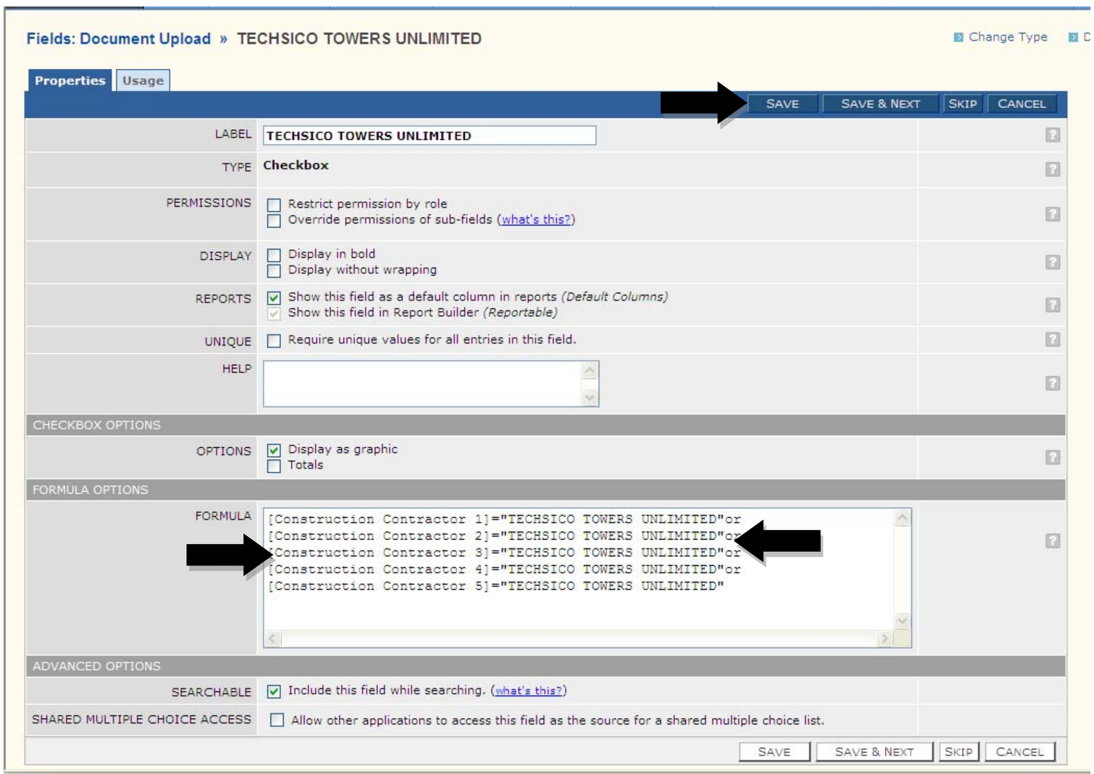
4. Once the new field has been created you will return to the field list. Locate the field the you just created and click on it.



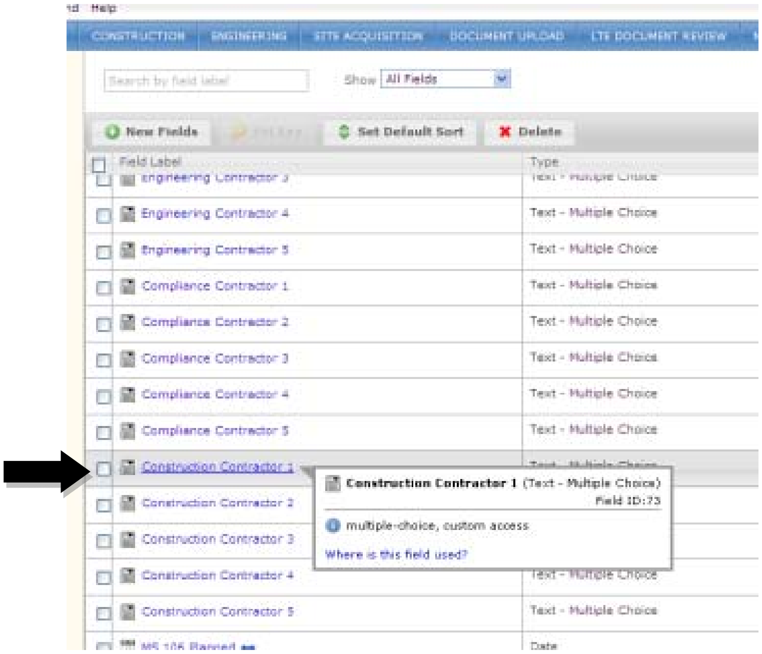
5. The following formula will need to be entered. The Type of Contractor will be changed to reflect whether the contractor is a Site Acq, Engineering, Compliance, or Construction Contractor. In the event a contractor overlaps the type of work performed they can be added for multiple types of Contractor. The user will need to add an additional "or after contractor 5. Contractor X should be updated to reflect how the contractor is listed in Oracle.

[Type of Contractor 1]="Contractor X Company"or
[Type of Contractor 2]=" Contractor X Company"or
[Type of Contractor 3]=" Contractor X Company"or
[Type of Contractor 4]=" Contractor X Company"or
[Type of Contractor 5]=" Contractor X Company"

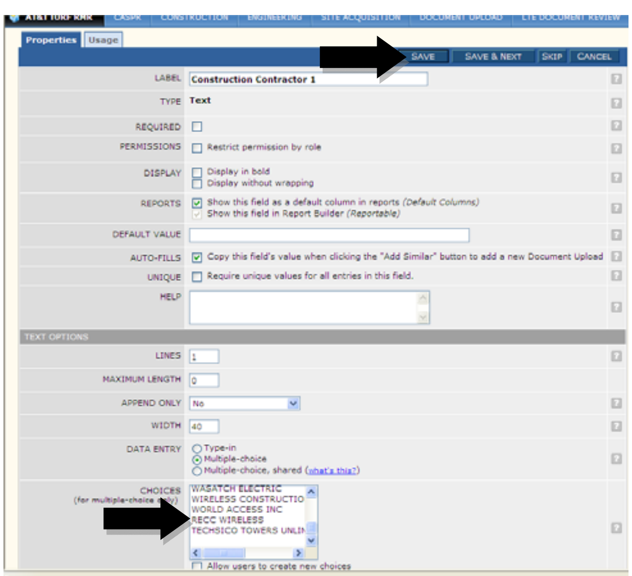
Below is an example for a construction contractor. Once updates have been made click Save



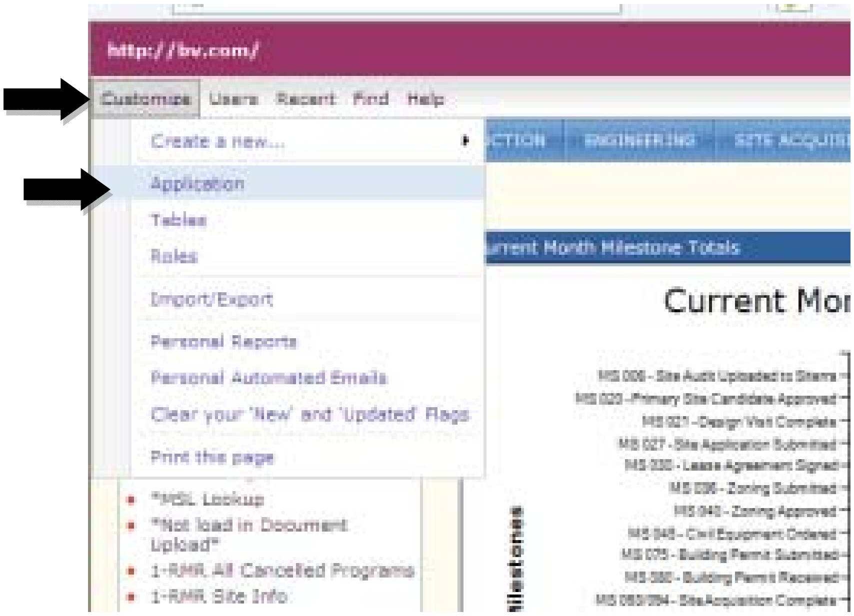
6. The user will return to the Field list and locate the type of contractor they are adding. The will then click on the contractor field.



7. The user will enter the new contractors name in the list of choices. The name entered **MUST** match the name entered in step 5. The user will click Save once complete and proceed to the next contractor type. There are a total of five for each type of contractor.

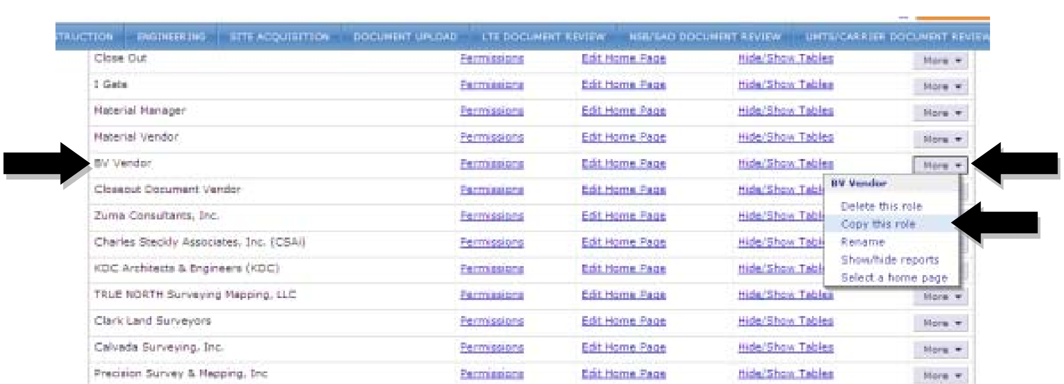


8. The user will now click on the Customize button located in the top left of the screen. Click Application.



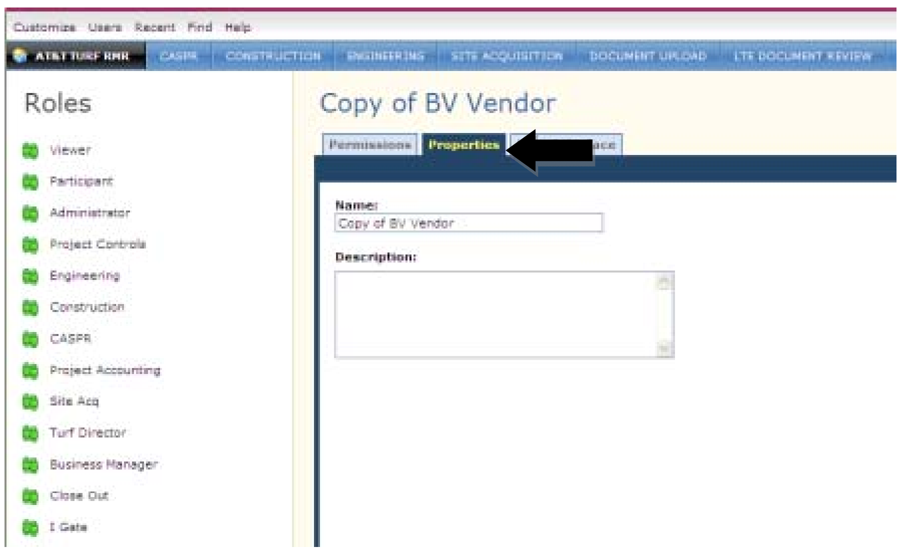
9. Click Roles.

10. Locate the BV Vendor Role. On the right side click More and select Copy This Role.

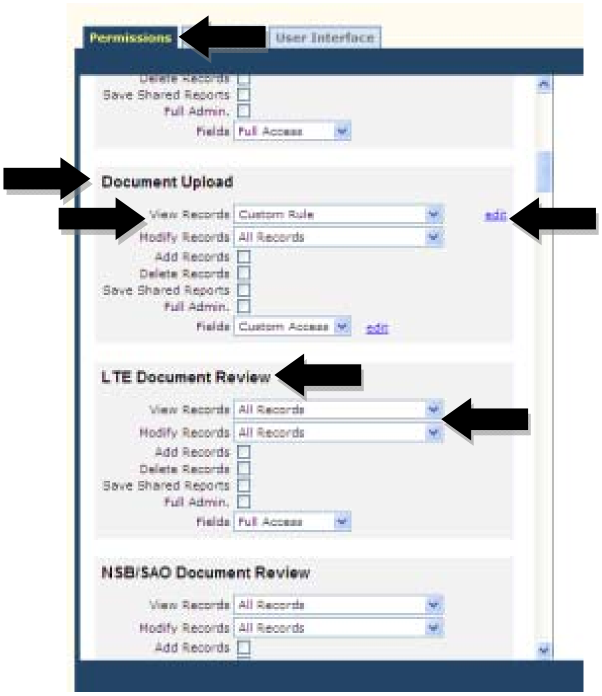


11. The Copy of BV Vendor role will fall to the bottom of the list. Locate this now. Click on Permissions.

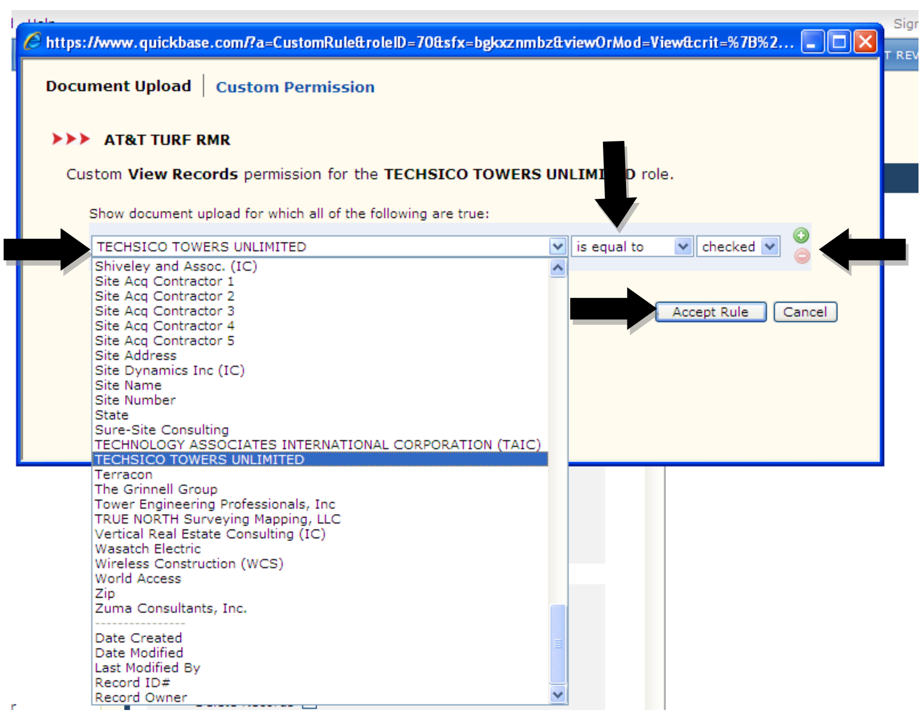
12. Click on the Properties tab. Update the name of the Copy of BV Vendor to reflect the contractor you are creating the role for.



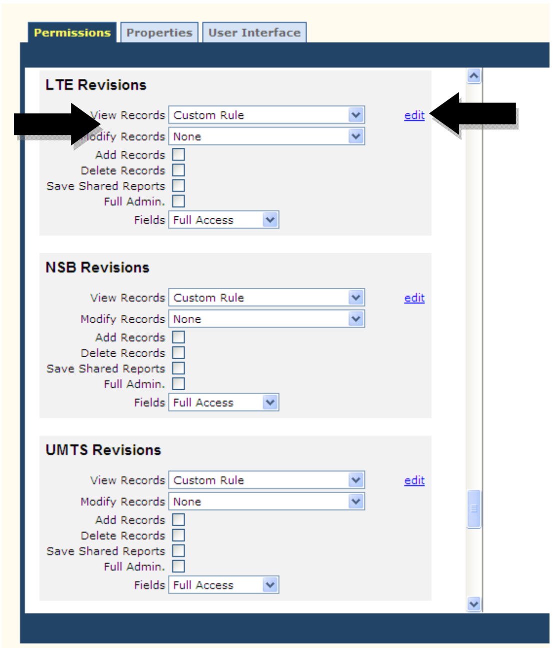
13. Next click on the Permissions tab. Scroll through the tables until you locate the Document upload table. Verify the View Records is set to Custom Rule and click Edit. The user should also verify the LTE, NSB/SAO, UMTS/Carrier, and MODS/Other Document Review tables have the View Records and Modify Records are set to **All Records**.



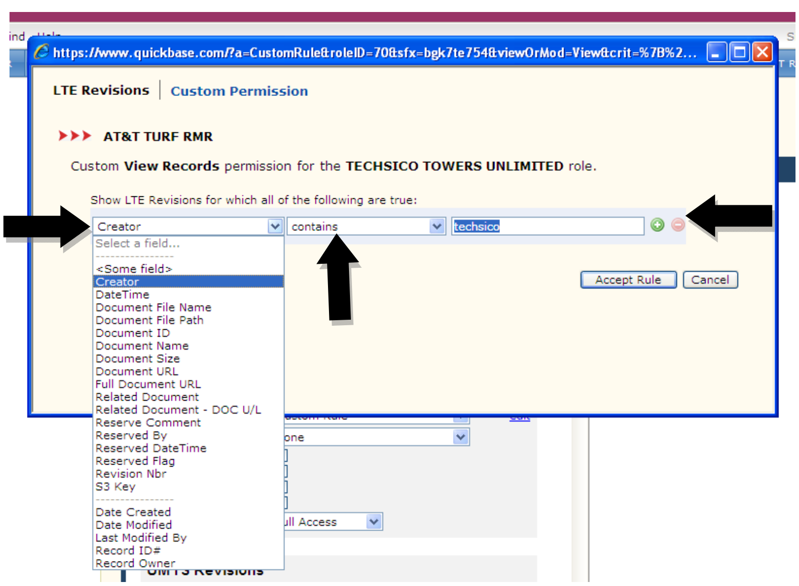
14. The user will now select the contractor check mark created in step 3. Verify the contractor is equal to Checked. Click Accept Rule.



15. Scroll down to Initiative Revisions Tables. There will be a table for LTE, NSB/SAO, UMTS/Carrier, and MODS/Other. The next series of steps will be repeated for each of the tables.
    a. Verify the View Records is set to **Custom Rule** and Modify Records is set to **None**.
    b. Verify the Add Records, Delete Records, Save Shared Reports, and Full Admin are all **UNCHECKED**.
    c. Click Edit

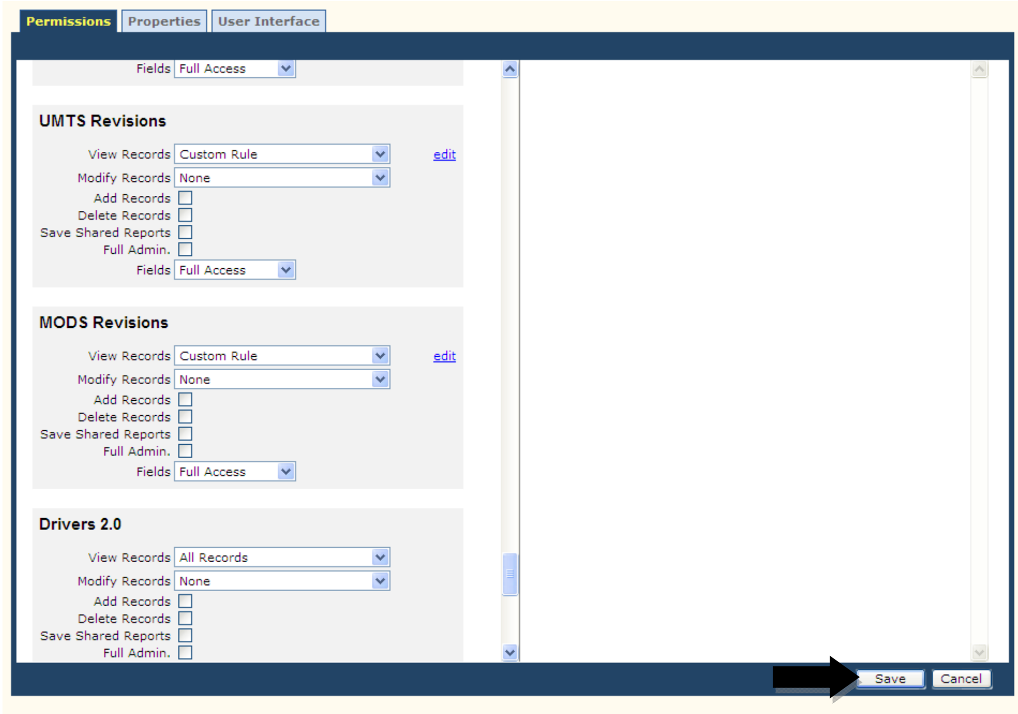


16. From the drop down menu select Creator. Verify contains is the criteria. The criteria should be the string at the end of the contractor company's email. In the example below the email address is XXXX@techsico.com. The user would select techsico as the criteria. Click Accept Rule.



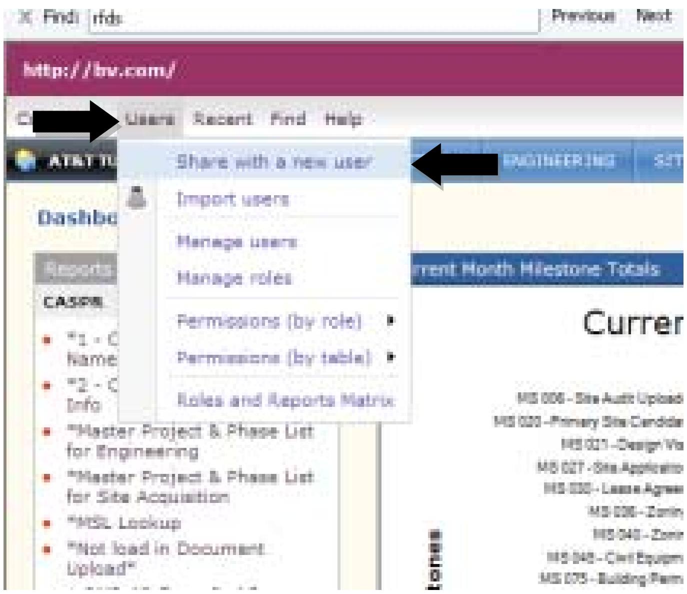
17. Repeat steps 15 and 16 for each additional Revisions table.

18. Once the Document Upload, LTE Document Review, NSB/SAO Document Review, UMTS/Carrier Document Review, MODS/Other Document Review and Revisions tables have been updated click Save.

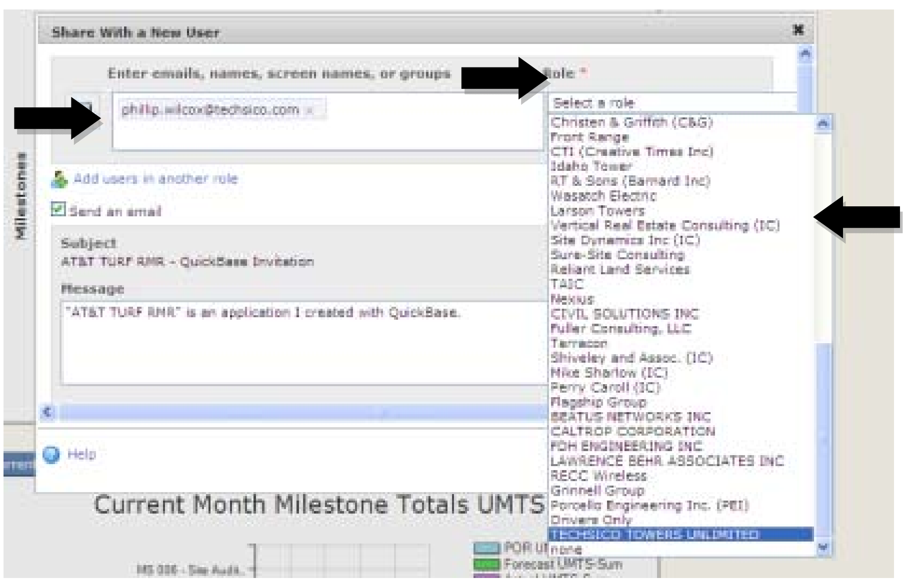


ADDING NEW USERS TO QUICKBASE

1. Locate the Users button located in the top left of the screen. Click Users and select Share with a new user.



2. Enter the email address of the new users being invited to QuickBase. Select the Role being assigned to the new user. If this is a Contractor being added select the role that ties to the contractor's company.



3. Click Send to invite the user to the application.