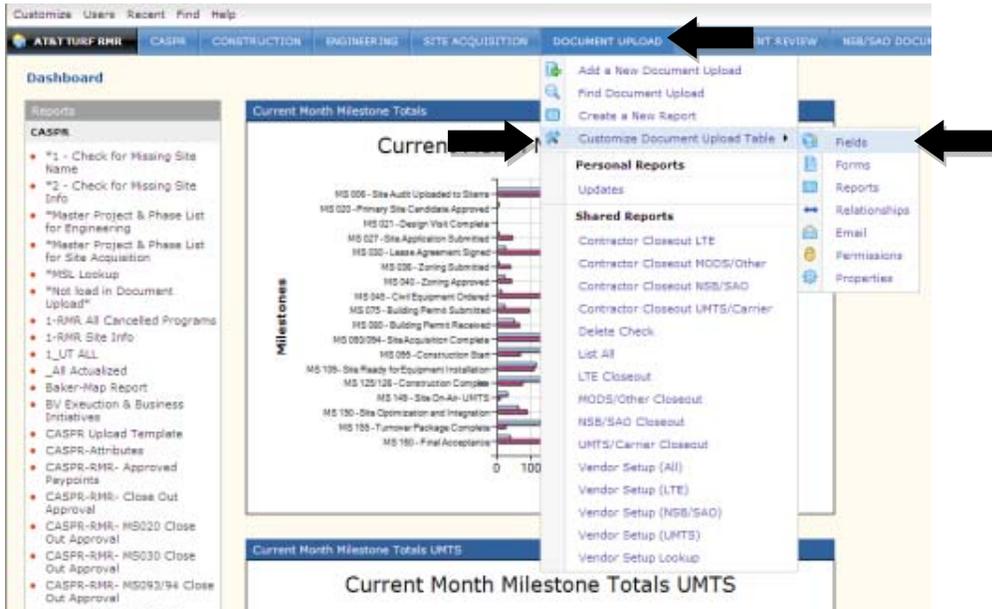


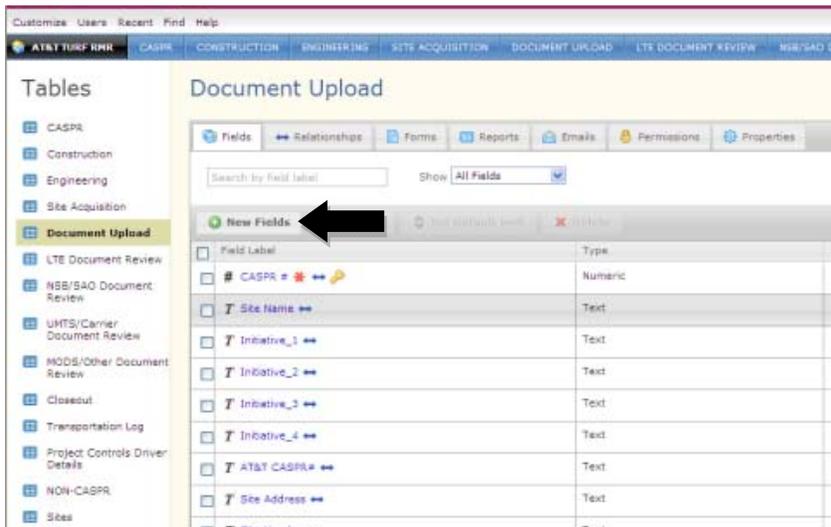
CREATING A NEW CONTRACTOR ACCOUNT

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

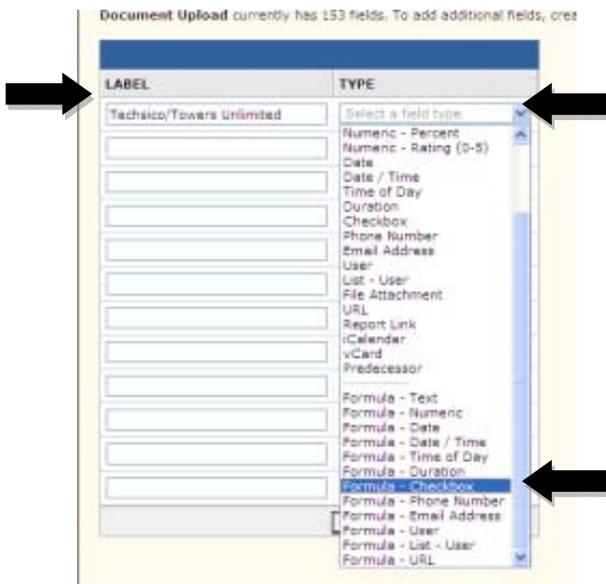
1. The user will click on the Document upload table and drop down to Customize Document Upload table and select Fields. The location of the Document Upload table may vary from the screen shot. If the user does not see the table click on the far right table with etc as part of the table name. The table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



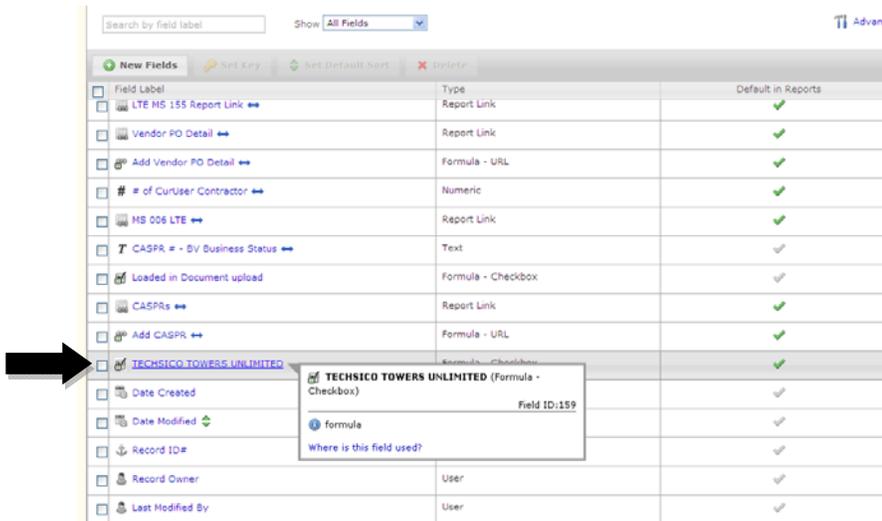
2. Click New Field.



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

Fields: Document Upload > TECHSICO TOWERS UNLIMITED

Properties Usage

SAVE SAVE & NEXT SKIP CANCEL

LABEL TECHSICO TOWERS UNLIMITED

TYPE Checkbox

PERMISSIONS Restrict permission by role
 Override permissions of sub-fields (what's this?)

DISPLAY Display in bold
 Display without wrapping

REPORTS Show this field as a default column in reports (Default Columns)
 Show this field in Report Builder (Reportable)

UNIQUE Require unique values for all entries in this field.

HELP

CHECKBOX OPTIONS

OPTIONS Display as graphic
 Totals

FORMULA OPTIONS

FORMULA {Construction Contractor 1}="TECHSICO TOWERS UNLIMITED"or
{Construction Contractor 2}="TECHSICO TOWERS UNLIMITED"or
{Construction Contractor 3}="TECHSICO TOWERS UNLIMITED"or
{Construction Contractor 4}="TECHSICO TOWERS UNLIMITED"or
{Construction Contractor 5}="TECHSICO TOWERS UNLIMITED"

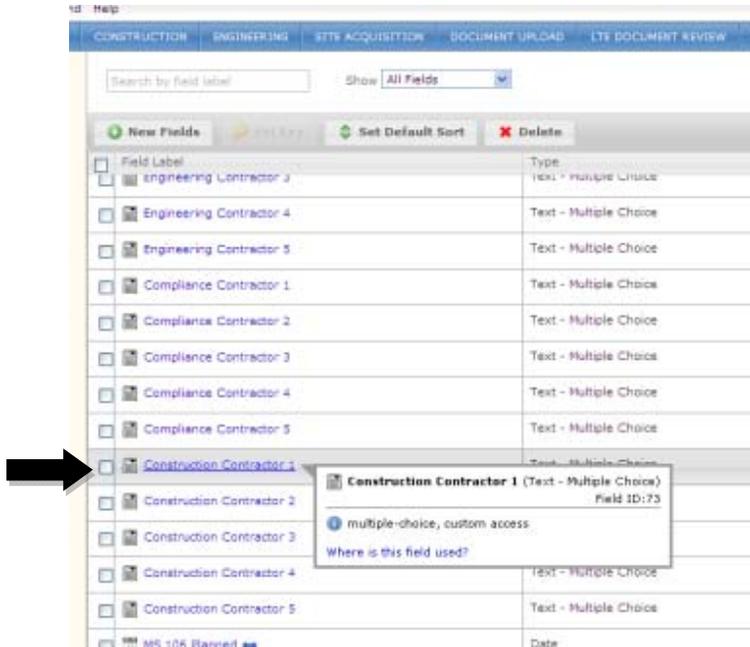
ADVANCED OPTIONS

SEARCHABLE Include this field while searching. (what's this?)

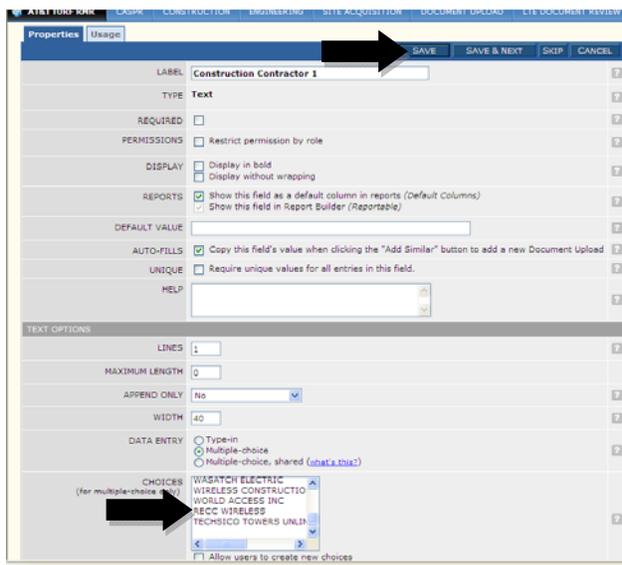
SHARED MULTIPLE CHOICE ACCESS Allow other applications to access this field as the source for a shared multiple choice list.

SAVE SAVE & NEXT SKIP CANCEL

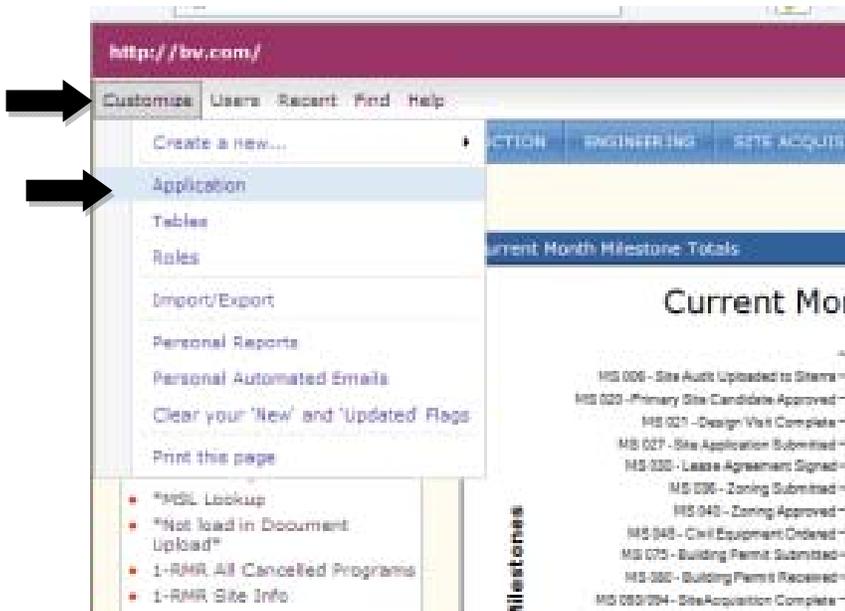
6. The user will return to the Field list and locate the type of contractor they are adding. The will then click on the contractor field.



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.



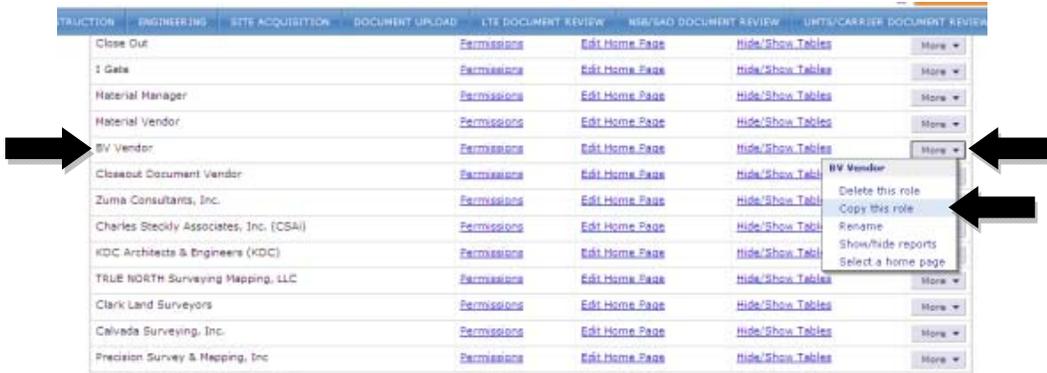
8. The user will now click on the Customize button located in the top left of the screen. Click Application.



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.

FDH ENGINEERING INC	Permissions	Edit Home Page	Hide/Show Tables	More ▾
LAWRENCE BEHR ASSOCIATES INC	Permissions	Edit Home Page	Hide/Show Tables	More ▾
RECC Wireless	Permissions	Edit Home Page	Hide/Show Tables	More ▾
Ginnell Group	Permissions	Edit Home Page	Hide/Show Tables	More ▾
Porcetta Engineering Inc. (PET)	Permissions	Edit Home Page	Hide/Show Tables	More ▾
Drivers Only	Permissions	Edit Home Page	Hide/Show Tables	More ▾
Copy of BV Vendor	Permissions	Edit Home Page	Hide/Show Tables	More ▾

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.

Customize Users Recent Find Help

AT&T TURF RMR CASPR CONSTRUCTION ENGINEERING SITE ACQUISITION DOCUMENT UPLOAD LITE DOCUMENT REVIEW

Roles

- Viewer
- Participant
- Administrator
- Project Controls
- Engineering
- Construction
- CASPR
- Project Accounting
- Site Acq
- Turf Director
- Business Manager
- Close Out
- I Gate

Copy of BV Vendor

Permissions **Properties** [ACE](#)

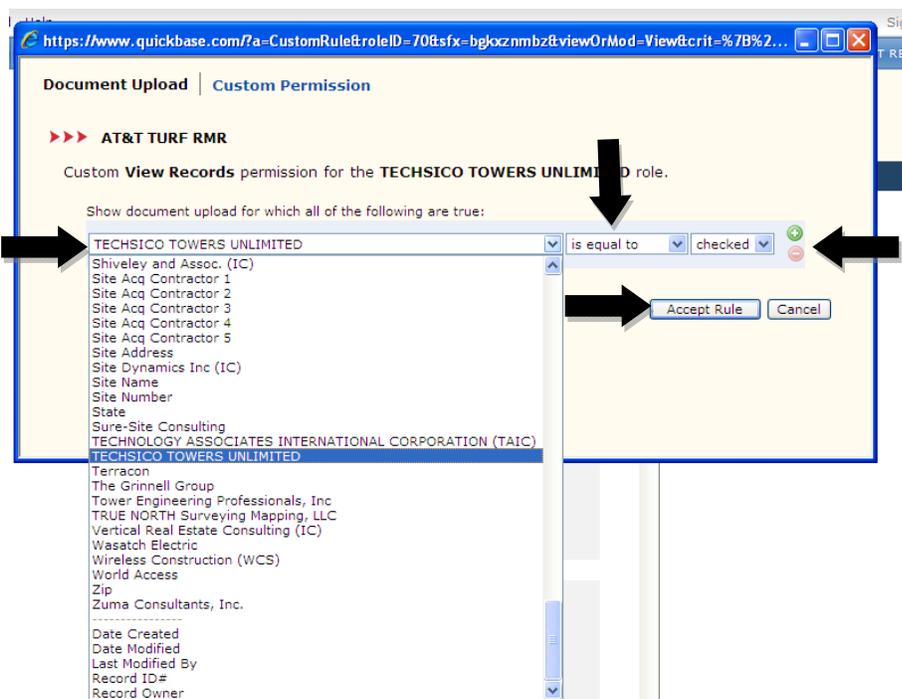
Name:

Description:

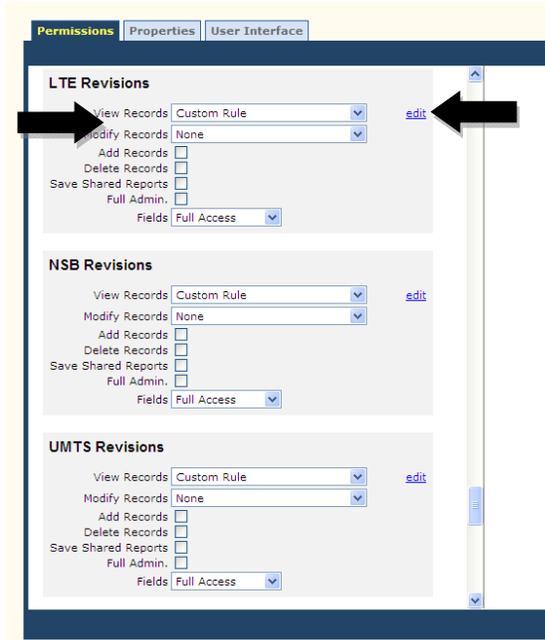
13. Next click on the Permissions tab. Scroll through the tables until you locate the Document upload table. Verify the View Records is set to Custom Rule and click Edit. The user should also verify the LTE, NSB/SAO, UMTS/Carrier, and MODS/Other Document Review tables have the View Records and Modify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



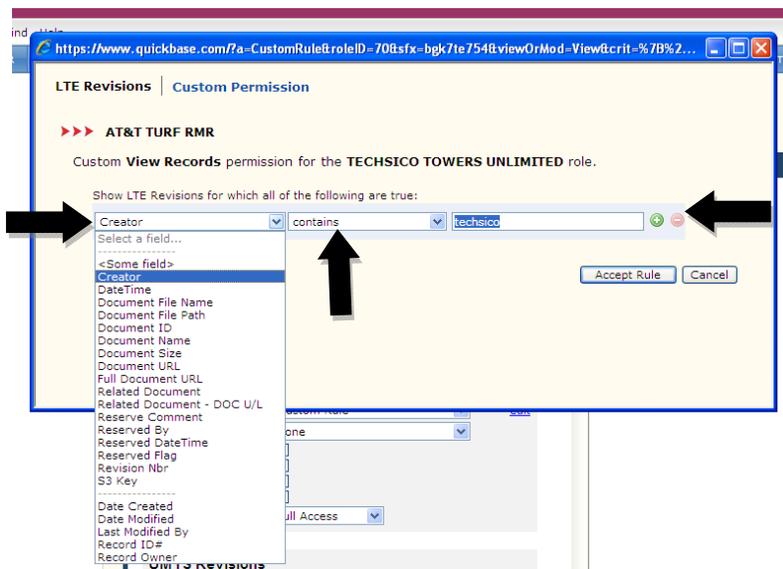
14. The user will now select the contractor check mark created in step 3. Verify the contractor is equal to Checked. Click Accept Rule.



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.

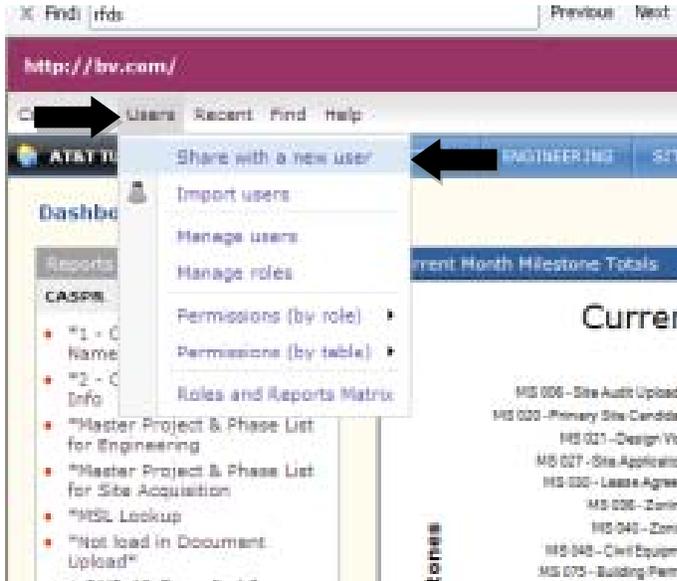
The screenshot shows a software interface with three tabs: 'Permissions' (selected), 'Properties', and 'User Interface'. At the top, there is a 'Fields' dropdown menu set to 'Full Access'. Below this are three sections for different tables:

- UMTS Revisions:** View Records (Custom Rule), Modify Records (None), Add Records (checkbox), Delete Records (checkbox), Save Shared Reports (checkbox), Full Admin. (checkbox), Fields (Full Access). An 'edit' link is next to the View Records dropdown.
- MODS Revisions:** View Records (Custom Rule), Modify Records (None), Add Records (checkbox), Delete Records (checkbox), Save Shared Reports (checkbox), Full Admin. (checkbox), Fields (Full Access). An 'edit' link is next to the View Records dropdown.
- Drivers 2.0:** View Records (All Records), Modify Records (None), Add Records (checkbox), Delete Records (checkbox), Save Shared Reports (checkbox), Full Admin. (checkbox).

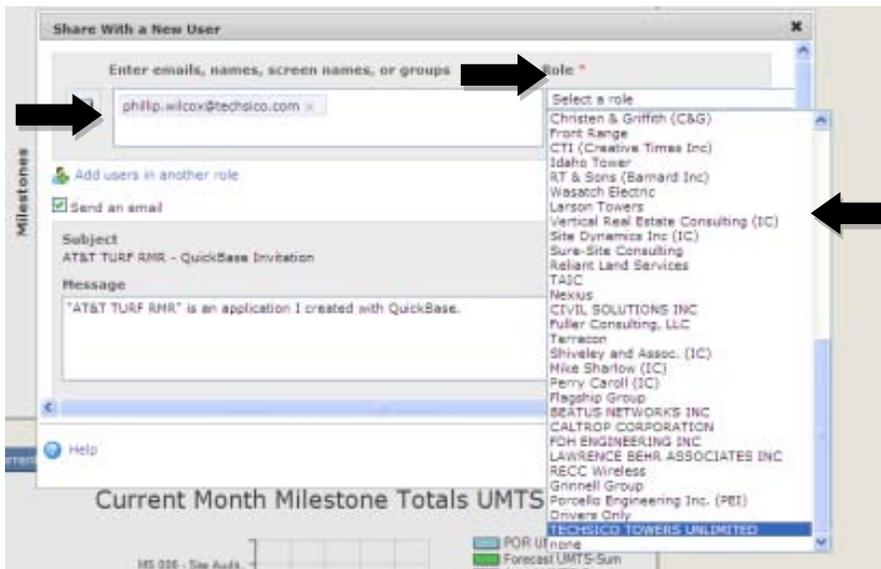
At the bottom right, there are 'Save' and 'Cancel' buttons. A black arrow points to the 'Save' button.

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.

The screenshot shows a dialog box titled "Share With a New User". At the top, there is a text input field labeled "Enter emails, names, screen names, or groups" containing the email address "philip.wilcox@techsico.com". To the right of this field is a dropdown menu labeled "Role" with the selected option "TECHSICO\POWERUSER". Below these fields, there is a checkbox labeled "Add users in another role" which is unchecked, and another checkbox labeled "Send an email" which is checked. Underneath, there is a "Subject" field containing "AT&T TURF RMR - QuickBase Invitation" and a "Message" text area containing the text "AT&T TURF RMR" is an application I created with QuickBase. At the bottom right of the dialog, there are two buttons: "Cancel" and "Send". A black arrow points to the "Send" button.