

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.

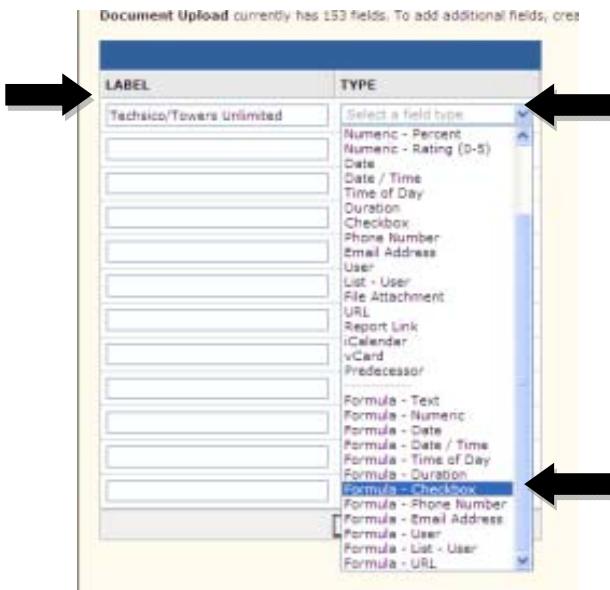
The screenshot shows the QuickBase dashboard with various tabs like AT&TURF RMR, CASPR, CONSTRUCTION, ENGINEERING, SITE ACQUISITION, DOCUMENT UPLOAD, LTE DOCUMENT REVIEW, NSB/SAO DOCUMENT REVIEW, and UMTS. The DOCUMENT UPLOAD tab is active. A context menu is open over the table, with the 'Fields' option highlighted. Three arrows point to the 'DOCUMENT UPLOAD' bar, the open context menu, and the 'Fields' option.

2. Click New Field.

The screenshot shows the 'Document Upload' table's 'Fields' view. The 'New Fields' button is highlighted with a large arrow. The table lists several fields:

Field Label	Type
CASPR # *	Numeric
Site Name	Text
Initiative_1	Text
Initiative_2	Text
Initiative_3	Text
Initiative_4	Text
AT&T CASPR	Text
Site Address	Text
Site Number	Text

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

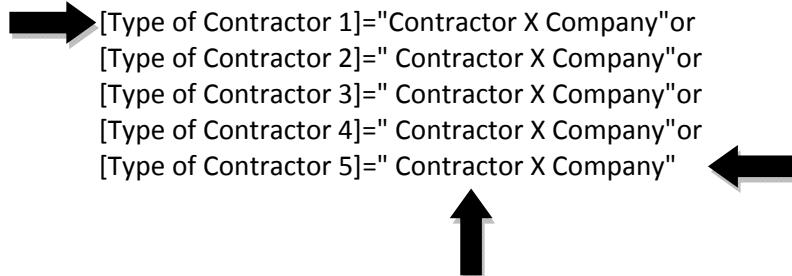


4. Once the new field has been created you will return to the field list. Locate the field the you just created and click on it.

Field Label	Type	Default in Reports
LTE MS 155 Report Link	Report Link	✓
Vendor PO Detail	Report Link	✓
Add Vendor PO Detail	Formula - URL	✓
# # of CurUser Contractor	Numeric	✓
MS 006 LTE	Report Link	✓
CASPR = - BV Business Status	Text	✓
Loaded in Document upload	Formula - Checkbox	✓
CASPRs	Report Link	✓
Add CASPR	Formula - URL	✓
TECHSICO TOWERS UNLIMITED	Formula - Checkbox	✓
Date Created		✓
Date Modified		✓
Record ID#		✓
Record Owner	User	✓
Last Modified By	User	✓

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	
LABEL	TECHSICO TOWERS UNLIMITED		
TYPE	Checkbox		
PERMISSIONS	<input type="checkbox"/> Restrict permission by role <input type="checkbox"/> Override permissions of sub-fields (what's this?)		
DISPLAY	<input type="checkbox"/> Display in bold <input type="checkbox"/> Display without wrapping		
REPORTS	<input checked="" type="checkbox"/> Show this field as a default column in reports (Default Columns) <input checked="" type="checkbox"/> Show this field in Report Builder (Reportable)		
UNIQUE	<input type="checkbox"/> Require unique values for all entries in this field.		
HELP	<div style="border: 1px solid #ccc; padding: 5px; height: 40px; overflow: auto;"> <p> </p> </div>		
CHECKBOX OPTIONS			
OPTIONS	<input checked="" type="checkbox"/> Display as graphic <input type="checkbox"/> Totals		
FORMULA OPTIONS			
FORMULA	<input type="checkbox"/> Construction Contractor 1)="TECHSICO TOWERS UNLIMITED" or <input type="checkbox"/> Construction Contractor 2)="TECHSICO TOWERS UNLIMITED" or <input type="checkbox"/> Construction Contractor 3)="TECHSICO TOWERS UNLIMITED" or <input type="checkbox"/> Construction Contractor 4)="TECHSICO TOWERS UNLIMITED" or <input type="checkbox"/> Construction Contractor 5)="TECHSICO TOWERS UNLIMITED"		
ADVANCED OPTIONS			
SEARCHABLE	<input checked="" type="checkbox"/> Include this field while searching. (what's this?)		
SHARED MULTIPLE CHOICE ACCESS	<input type="checkbox"/> 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 user will then click on the contractor field.

Field Label	Type
Engineering Contractor 3	Text - Multiple Choice
Engineering Contractor 4	Text - Multiple Choice
Engineering Contractor 5	Text - Multiple Choice
Compliance Contractor 1	Text - Multiple Choice
Compliance Contractor 2	Text - Multiple Choice
Compliance Contractor 3	Text - Multiple Choice
Compliance Contractor 4	Text - Multiple Choice
Compliance Contractor 5	Text - Multiple Choice
Construction Contractor 1	Text - Multiple Choice
Construction Contractor 2	Text - Multiple Choice
Construction Contractor 3	Text - Multiple Choice
Construction Contractor 4	Text - Multiple Choice
Construction Contractor 5	Text - Multiple Choice

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.

LABEL: Construction Contractor 1

TYPE: Text

REQUIRED:

PERMISSIONS: Restrict permission by role

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)

DEFAULT VALUE:

AUTO-FILLS: Copy this field's value when clicking the "Add Similar" button to add a new Document Upload

UNIQUE: Require unique values for all entries in this field

HELP:

TEXT OPTIONS: LINES: 1
MAXIMUM LENGTH: 0
APPEND ONLY: No
WIDTH: 40

DATA ENTRY: Type-in
Multiple-choice
Multiple-choice, shared ([#data#](#))

CHOICES (for multiple-choice):

- WASATCH ELECTRIC
- WIRELESS CONSTRUCTION, INC.
- NECC WIRELESS INC
- TECHSCO TOWERS UNLTD
- TECNICO TOWERS UNLTD

Allow users to create new choices

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

The screenshot shows the BV.com application interface. At the top, there's a purple header bar with the URL 'http://bv.com/'. Below it is a navigation bar with links for 'Customize', 'Users', 'Recent', 'Find', and 'Help'. A black arrow points to the 'Customize' link. To its right, a second black arrow points to the 'Application' link in a dropdown menu. The main content area displays a 'Current Month Milestone Totals' report with a table of data. On the left, a sidebar lists various options under 'Application': 'Tables', 'Roles', 'Import/Export', 'Personal Reports', 'Personal Automated Emails', 'Clear your 'New' and 'Updated' Flags', and 'Print this page'. Below these are several redacted items starting with '#MSL Lookup', '#Not load in Document Upload', '#I-RMR All Cancelled Programs', and '#I-RMR Site Info'. A vertical sidebar on the far left is labeled 'Milestones'.

9. Click Roles.

The screenshot shows the 'Roles' tab selected in the navigation bar. A black arrow points to the 'Roles' link. The main content area displays a table titled 'Role' with several entries: 'Viewer', 'Participant', 'Administrator', 'Project Controls', 'Engineering', and 'Construction'. On the left, there are links for 'Create a new Role', 'Reorder Roles', and 'Roles/Reports Matrix'.

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

The screenshot shows the 'BV Vendor' role selected in the 'Roles' list. A black arrow points to the 'More' button next to the 'BV Vendor' entry. A context menu is open over the 'More' button, with 'Copy this role' highlighted. Other options in the menu include 'Delete this role', 'Rename', 'Show/hide reports', and 'Select a home page'. The background shows a table of other roles like 'Close Out', '1 Gate', 'Material Manager', 'Material Vendor', 'Closeout Document Vendor', 'Zuma Consultants, Inc.', 'Charles Steckly Associates, Inc. (CSAI)', 'KDC Architects & Engineers (KDC)', 'TRUE NORTH Surveying Mapping, LLC', 'Clark Land Surveyors', 'Calvada Surveying, Inc.', and 'Precision Survey & Mapping, Inc.'.

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

FCH 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 ▾
Forcillo Engineering Inc. (PEI)	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 LTR DOCUMENT REVIEW

Roles

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

Copy of BV Vendor

Permissions Properties Description

Name: Copy of BV Vendor

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.

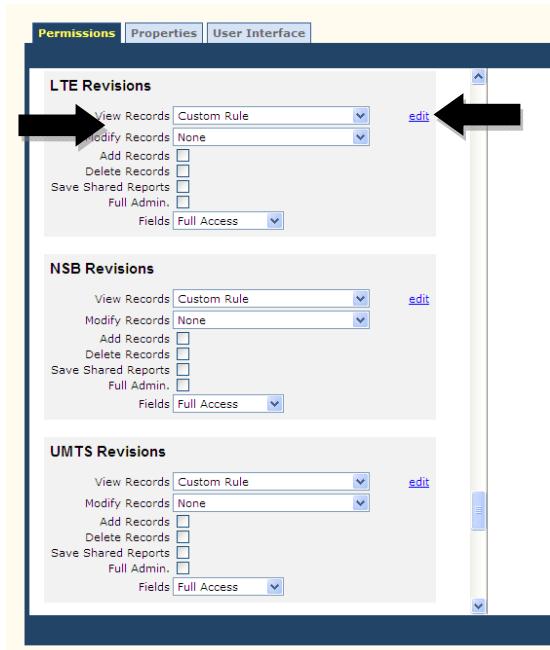
The screenshot shows the 'Permissions' tab in the Quickbase interface. It displays four sections: 'Document Upload', 'LTE Document Review', 'NSB/SAO Document Review', and 'UMTS/Carrier Document Review'. In each section, the 'View Records' dropdown is set to 'Custom Rule'. The 'Modify Records' dropdown is set to 'All Records'. The 'Fields' dropdown is set to 'Full Access' for the Document Upload section. Arrows indicate the configuration of these settings across the different tables.

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

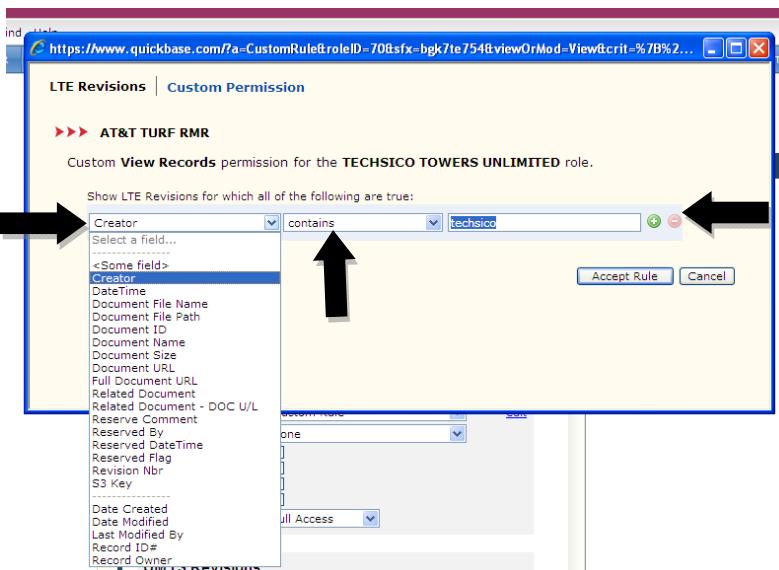
The screenshot shows a 'Custom Permission' dialog for the 'Document Upload' table. It displays a dropdown menu with 'TECHSICO TOWERS UNLIMITED' selected. To the right of the dropdown are operators 'is equal to' and a checked checkbox. Below the dropdown are 'Accept Rule' and 'Cancel' buttons. Arrows point to the dropdown menu, the 'is equal to' operator, and the checked checkbox, indicating the configuration of the custom 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

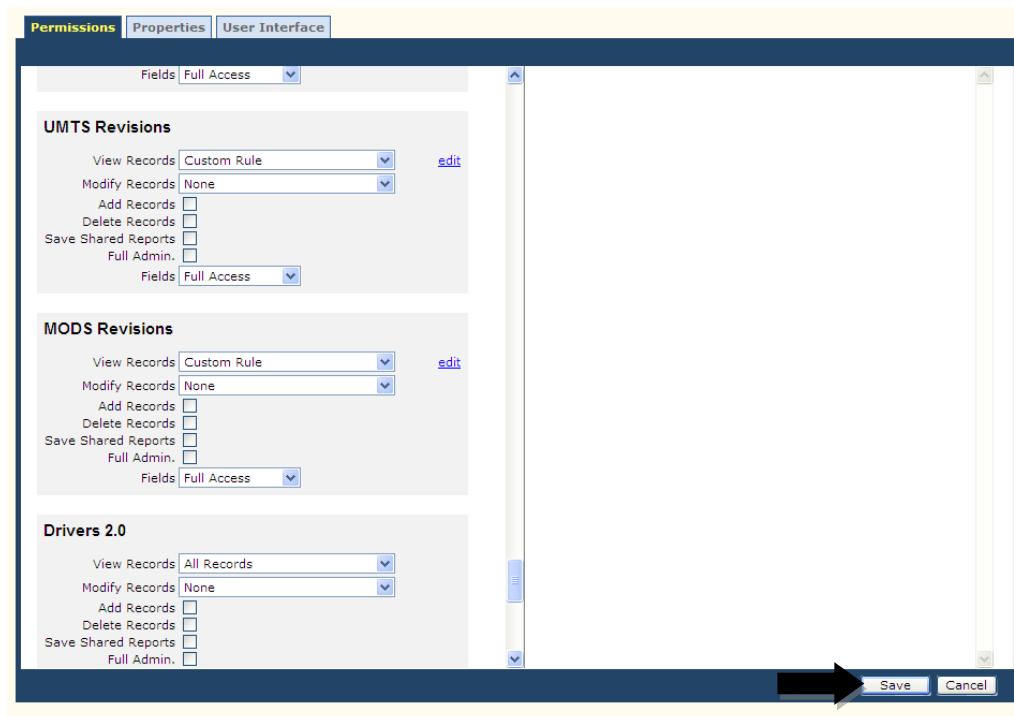


16. From the drop down menu select Creator. Verify contains is the criteria. The criteria should be the string at the end of the contractor company's email. In the example below the email address is XXXX@techsico.com. The user would select techsico as the criteria. Click Accept Rule.



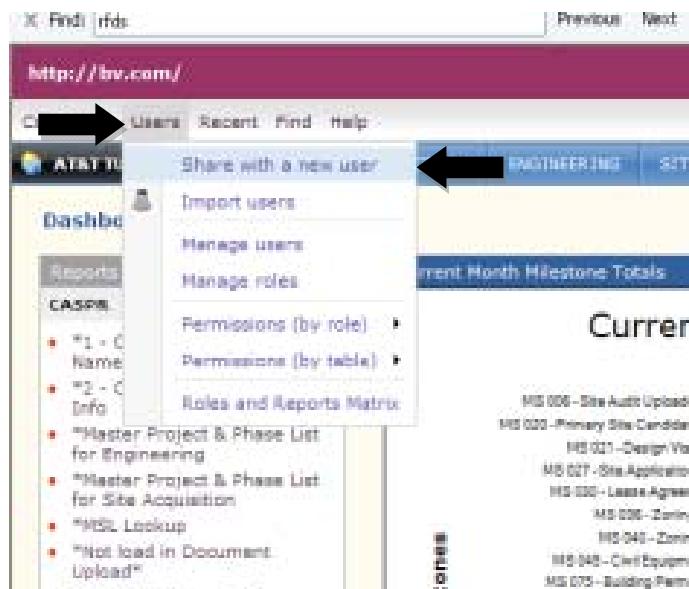
17. Repeat steps 15 and 16 for each additional Revisions table.

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.

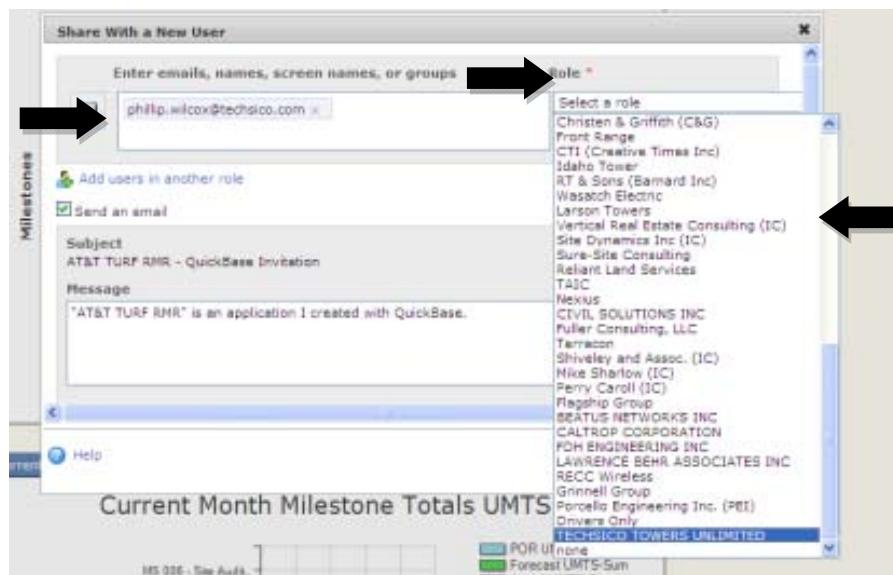


ADDING NEW USERS TO QUICKBASE

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.

