



Users, Roles, and Access Levels Explained  
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## Introduction

PHAZE™ is operated securely utilizing role-based user access and its Security Matrix which enables user functionality beyond the security access pre-defined in the software itself.

PHAZE security has a hierarchy which establishes governance of project data and establishes control over project management, collaboration and ball-in-court responsibility.

PHAZE roles have been defined for all types of projects for every organization type. The roles are expressed in the hierarchy provided below in Figure 1:

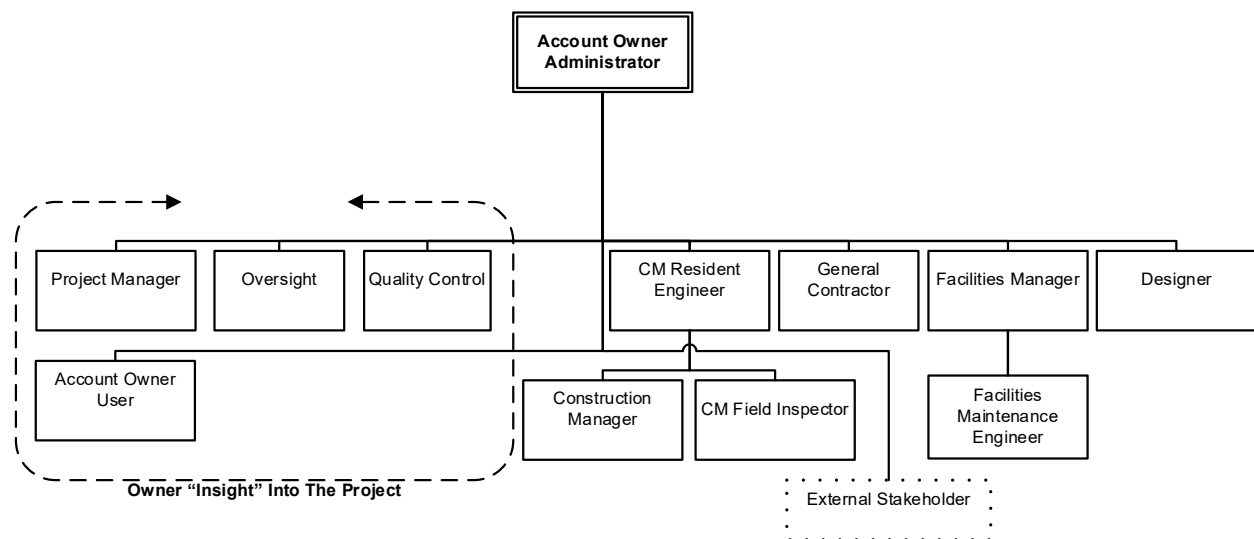


Figure 2: PHAZE Role-Based Hierarchy

The account owner administrator, referred to in all PHAZE guides as the “Account Owner Admin”, is responsible for setting up all user account and PHAZE security.

Users are added to PHAZE as employees or direct stakeholders of the owner organization, such as Owner Apartment Complex Tenants. The roles displayed in Figure 1 in within the dotted lines on the left are owner organization employee roles. It is understood that specialty consultants may work as agents of the owner organization and perform work in any of these owner organization employee roles. It must be understood that such staff members operate with the **owner “Insight” into the project**.

PHAZE was conceived and developed from its founder’s 25 years of experience implementing projects which required collaboration with managers of construction projects, general contractors, facility managers, specialty engineers, architects and other specialty vendors, planners and consultants known as External Stakeholders in PHAZE. While the roles appear to be Facilities Management, Architecture, Engineering and Construction industry specific, these PHAZE roles are perfect for any project where collaboration with hired help, internal and external project teams is required.

Consider the following project examples, they all require vendors, consultant and contractors to complete the project with transparency and accountability on schedule and within budget: Recording Artist Tour, Corporate Conference, Large Wedding, Home Construction, Capital Program Management, PMOs, Facilities Management & Maintenance, School System Management, even the coordination of a disbursed family's family reunion!

This document has been provided to explain each role and the intent of having a user specified as a member of a particular role. First, let's explain a User on the most basic level.

## About Users

System Users are unique and each one will experience PHAZE in a way that is relevant to them. Like most Accounts, a user will have a **Login Name**, also known as a **User Name** and a **Password**. These credentials are what will give a user access to the system.

Other attributes that all users share include:

### **First and Last Name**

This is the user's first and last name that they would like to be known as. It will be displayed to other users in the format of Last Name, First Name.

### **Email Address**

PHAZE sends out email notifications when certain processes that the user is involved in are transitioned to a process workflow step. The user's email address is also used to send them their User Name and Password initially.

### **Access Level**

(See Content Below)

### **Time Zone**

PHAZE can adjust the times displayed to the user using this Time Zone attribute. All users must set their time zone.

### **Two Factor Authentication and Cell Phone Email Address**

PHAZE supports two factor authentication by requiring an access code when a user is trying to login. This code gets sent to the user's **Cell Phone Email Address**, if provided, and this address receives the code as an SMS message. For a list of supported carriers and formatting help, see the Appendix A at the end of this document. Access codes are also emailed to the user's standard email address.

## **Security Questions**

All users have security questions they must provide answers for in the event they need to have their password reset and emailed to them.

## **Other User Configuration Options**

There are options for users that are configured based on the **Role**, also known as **Access Level**, of the user. These are discussed further in this document, but there are also options for users that are based on the individual. Individual user options are:

### **No Limits Document Discovery**

This option will give users access to a special document discovery query that returns ALL documents, regardless of private or who it was routed to. This feature is recommended for Administration only. However, document controls specialist may also be given the security privilege.

### **Ticket Approver**

This option will give responsibility to the user for approving tickets that were submitted for approval in the Assets and Materials module.

### **Asset Access**

This allows users to access the Asset and Materials module. They will be able to view the Assets and Materials and create tickets.

### **Asset Creator**

This option allows the user to create and edit Assets and Materials from the Asset and Materials Database.

### **Transparency Flag**

This option will make all Transmittals that the user creates visible to the Account Owner Organization's users. Note: Users with this option enabled will NOT be aware that the Account Owner Organization is able to view their Transmittals. Use Case Example: General Contractors can submit transmittals directly to other General Contractors in your PHAZE project. The Transparency Flag makes the GC to GC transmittals visible by all Account Owner roles. If this feature is not desired, do not assign it to anyone.

**No Limits Document Discovery** would be utilized when insight to non-accessible transmittals is required.

### **Account Actions**

This flag enables users to have Account Level access across all projects they have been assigned. For example, they will see Processes from every project they are involved with.

### **Scheduler Access**

This allows users to view Schedules (Gantt Charts) that are in the users' current projects.

### **Scheduler Create/Edit**

This allows users to create schedules and edit schedules that that users have created.

### **Vendor Issue Options**

This allows the user access to the Vendor Issue Log, where they can view and create Vendor Issues. Users can only see Vendor Issues that they created or that were routed to them.

### **Dashboard Access**

This allows the user access to the main dashboard.

### **Dashboard Access RFI**

This allows the user access to the RFI dashboard.

### **Dashboard Access Work Orders**

This allows the user access to the Work Order dashboard.

### **Dashboard Access Issue**

This allows the user access to the Issue dashboards.

### **Dashboard Access Vendor Issues**

This allows the user access to Vendor Issues dashboards.

## Role Based Configuration Settings

There are settings that are controlled based on the role for the users in the account. Meaning that every user in the role will have the setting applied when the Account Owner Admin selects the option. Specifically, Reports are configured on a Role Based level for the account. For example, if the Account Owner Admin checks the box for RFI Reports for General Contractors, all General Contractors in the account will have access the RFI Reports. Note: Reports still apply rules of who is privy and Ball In Court; meaning that you will not see information you are not already able to view by running a Report.

## Roles (Access Levels)

A Role (Access Level) will determine what the user sees, has access to, and is designed to facilitate what the intended role is supposed to do in a Project/Account. Many options can be configured by the Account Owner Admin, but some of the options are specific to the Role and are explained below.

### Account Owner Admin

The **Account Owner Admin** role is the first and most essential role in PHAZE. This user is created when an Account Trail begins and will have responsibilities for:

- Creating Other Users

- Creating New Projects
- Creating New Companies
- Importing data to PHAZE
- Setting up other users' privileges and access
- Managing the Account

This role is different from the other roles, because many of the read-only and protected values are editable by the AccountOwnerAdmin role in order to correct mistakes, fix errors, and keep the system accurate. Also, the configuration options do not always apply to this role. They will have access to the areas of PHAZE that normally would require a user configuration option to be enabled.

### AccountOwnerUser

The **Account Owner User** role is for users who are part of the Account Owner Admin's organization.

This role can create:

- **Work Orders**
- **Transmittals**
- **Issues**

### ConstructionManager

The **Construction Manager** role is intended for Construction Managers. Construction Managers have a unique role in PHAZE because they are responsible for being a participant in the **RFI** process.

The also can create:

- **Issues**
- **Transmittals**

### Designer

The **Designer** role is for users who are Architects, Designers, or similar industry personnel. This role is unique because it is part of the **RFI** process.

They can also create:

- **Issues**
- **Transmittals**

### ExternalStakeholder

The **External Stakeholder** role is for users who need access to PHAZE but are not necessarily associated with the parties and organizations involved, need limited access to the project data, or only need to collaborate with Processes they are carbon copied into.

They can create a **Vendor Issue** only if they have the Vendor Option Enabled.

### FacilitiesMaintenanceEngineer

The **Facilities Maintenance Engineer** is a role for Engineers, Maintenance Personnel, Janitorial staff, or any user who the **Facilities Manager** intends to assign **Work Orders** to. This role is required for the Work Order Process. Within the Work Order process, the **Facilities Manager** will assign a **Lead Engineer**.

While the **Lead Engineer** is not a designated role, this user will have responsibility to move the Work Order through the process, as well as assign additional **Facilities Maintenance Engineers** to the work order. The users that are assigned by the **Lead Engineer**, will not have Ball In Court Responsibility, and will not be able to move the Work Order through the process.

They can create:

- **Issues**
- **Transmittals**
- **Recurring Tasks**

### FacilitiesManager

The **Facilities Manager** is a role for managers that are responsible for the assignment of **Work Orders** to the **Facilities Maintenance Engineers**. When a User creates a Work Order, the Facilities Managers in the Project will find them in the Unassigned Work Orders menu item. This is a unique area specifically for Facilities Managers.

They can create:

- **Work Orders**
- **Issues**
- **Transmittals**
- **Recurring Tasks**

### FieldInspector

The **Field Inspector** role creates **Daily Report** process instances. The FI is a person who is hired on a project to provide an in-person visual inspection of assets, homes, apartment buildings, and other commercial real estate. They also do collateral inspections of equipment such as bulldozers, excavators, boats, RVs, even medical equipment leased to a clinic or hospital. In PHAZE the **Field Inspector** will utilize the **Diary Report** to record the inspection details. The **Daily Report** process will be released in Q4 of 2020.

They can create:

- **Issues**
- **Transmittals**
- **Dairy Report (Q4 2020)**

### GeneralContractor

The **General Contractor** role is the primary role in the creation of **RFIs** (Request For Information). They are responsible for creating the RFI which is sent to the **Construction Manager** and in due course, eventually sent back to the **General Contractor** for their closure. As stated here

They can create:

- **RFIs**
- **Issues**
- **Transmittals**



## Oversight

The **Oversight** role has the privileges of the Account Owner Admin but cannot change or edit anything. They are intended to be a read-only role used for viewing the data and cannot create any processes.

*Note: The oversight role is often assigned to visiting auditors or government oversight personnel and/or inspectors.*

## ProjectManager

The **Project Manager** role is for users which are intended to see data from many Projects and will by default have access to **Account Actions**. This role has less restricted access to Processes and can view **Private** processes and collaboration that would otherwise be hidden from other roles.

They can create:

- **Work Orders**
- **Issues**
- **Transmittals**

## QualityControl

The **Quality Control** role is for individuals who are responsible for reviewing the work of the **Facilities Maintenance Engineers**. They are an optional part of the Work Order Process. When creating a Work Order, users can select if there is going to be a Quality Control Step per their organizations' directives. At which point, if 'Yes' is selected, users will be presented with a list of **Quality Control** users to select to review the work. The role can forward Work Orders for closure if the quality of work is sufficient or send the work back to the **Facilities Maintenance Engineers** for review/ further improvements.

They can also create:

- **Issues**
- **Transmittals**

## ResidentEngineer

The **Resident Engineer** role creates **Daily Diary** process instances. The RE is an engineer employed to supervise projects for the project owner (PHAZE account owner, i.e. the client). The RE will report regularly to the project owner and other stakeholders via the submission of a **Daily Diary** entry. The **Daily Diary** process will be released in Q4 of 2020.

They can create:

- **Issues**
- **Transmittals**
- **Daily Diary** (Q4 2020)