TERTIUS

THE DISTRICT'S ONLINE
MARKETPLACE FOR
CONSTRUCTION INSPECTIONS

A GUIDE FOR CUSTOMERS

tertius.dcra.dc.gov

DOB
DC DEPARTMENT OF BUILDINGS

WE ARE WASHINGTON
GOVERNMENT OF THE
DISTRICT OF COLUMBIA
MURIEL BOWSER, MAYOR

Contents

Tertius Introduction

Tertius is a marketplace platform in which DOB customers (project owners) connect with and invite Third-Party Inspection Agencies (TPIA) to work on their projects. Through Tertius, customers schedule inspections on open permits. Permits can be closed once all inspections are completed, filed by the TPIA, and approved by DOB. Tertius also provides a one-stop shop for uploading reports and documentation, where they are accessible for review by all stakeholders.

Log In and Register

Register for Tertius

Requirements

Select a password for your account. It must comply with the following:

- At least 8 character(s)
- At least 1 number(s)
- At least 1 symbol(s)
- At least 1 lowercase letter(s)
- At least 1 uppercase letter(s)
- Does not contain part of username
- Does not contain the first name used for registration
- Does not contain the last name used for registration

Steps

Step 1: Log in to [Access DC](#)

To register with Access DC:

1. Select the Register button on the Tertius homepage.
2. Select the Register with Access DC button.
3. Choose the sign-up option.
4. Enter the email address where you received the invitation to register for Tertius, password, first name, last name, and mobile phone number.
5. Receive the verification email and verify your email address as directed. Remember to check your spam folders. If you do not receive a verification email, please contact DOB via email at DOB@dc.gov.

If you are a registered Access DC user:

Follow the link provided in the Tertius invitation: tertius.DOB.dc.gov. Once in Tertius select Login at the top right corner of the screen. You will be navigated to the Access DC home screen. Login as usual.

Step 2: Access Tertius
After verifying your email address in Access DC, you will be redirected to your Tertius account.

Reset Password

If you forget or need to change your password, visit Access DC and select the "Need help signing in?" option. Next, select Forgot Password? Then, enter your Access DC email address as directed.

Log In To Tertius

Requirements

If you don't have one yet, follow the steps in this section:
● Register for Tertius

Steps

Follow these steps to log in to Tertius:

1. Visit tertius.DOB.dc.gov.
2. Select log in at top right.
3. Sign in with your Access DC account.
4. You will be navigated to the Dashboard.

Get to Know Your Dashboard

Requirements

● Log In To Tertius

Steps

Following login, you are navigated to the Dashboard, where you will find an overview and the latest information on your projects.

Navigate from the Dashboard:

● **Find an Inspector:** Create project and request proposals.
● **Menu**: The main menu is at left. Here, access the Dashboard, projects, messages,payments, and user profile.
● **Received Proposals**: Proposals received for proposal-based projects.
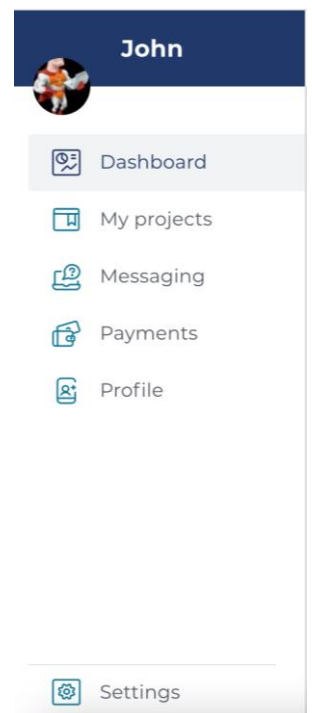
- **Scheduled Inspections**: Review inspections that have been scheduled.
- **Reports**: Review submitted Inspection Reports.

Regular Inspections

Customers who require special inspections will find an inspector using a different procedure than those who require regular inspections.

In general, use the Regular Inspections workflow if you have issued permits. Otherwise, the Special Inspections workflow is appropriate. If you are unsure of whether you need a regular or special inspection, contact DOB Customer Service at 202-671-3500 or DOB@dc.gov.

Find instructions on how to initiate special inspections in the Special Inspections section.

Find an Inspector

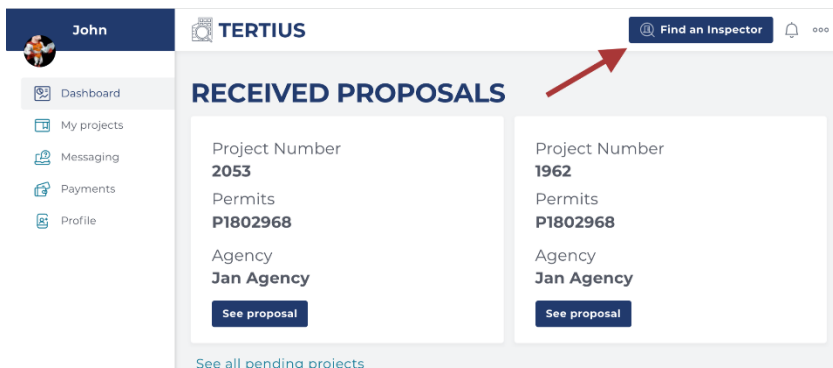To find an inspector, first create and submit a project by following the steps below.
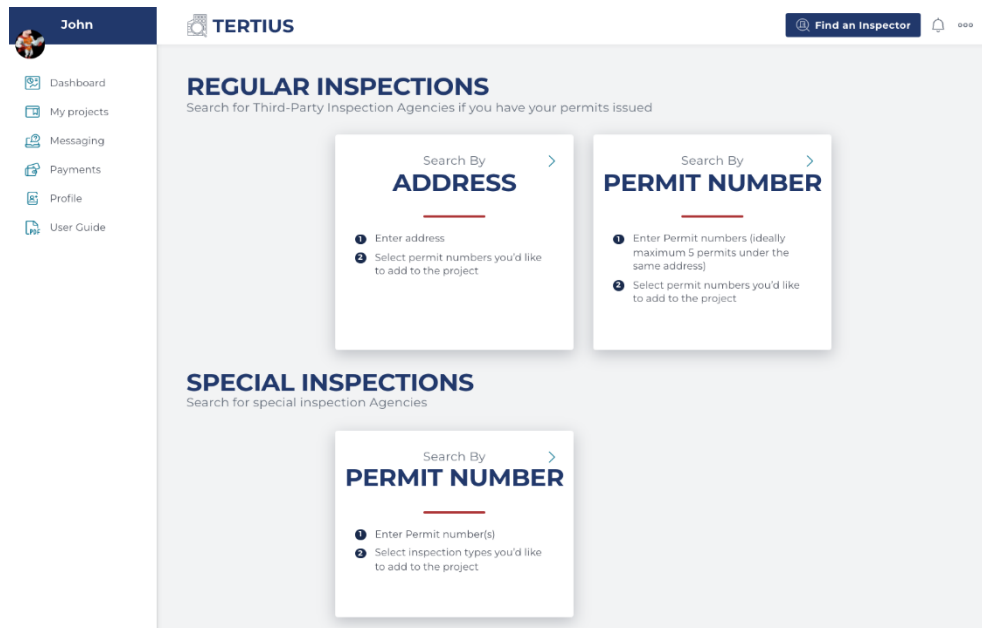
Requirements

- Log In To Tertius

Steps

Step 1: Search for an Inspector:

1. Select the Find an Inspector button.

2. Select Search by Address or Permit Number in the Regular Inspections section.

   a. Address-Based Search
      i. Complete the form with the address of the property under construction and Tertius will provide a list of associated open permits. Fields include:
         1. Street Number
         2. Street Number Suffix
         3. Street Name - If the address is a numbered street, please include the "th", "rd", "st", etc. as in 4th Street SW. If the street name includes North, South, East, or West, spell out the words, e.g., North Capitol. Please use the full street name, abbreviations are not accepted.
         4. Street Type
         5. Unit Number
         6. Quadrant
         7. Zip Code
   b. Permit-Based Search: Enter your permit number or numbers divided by commas. All permits must be under the same address.
3. Select Continue.

Step 2: Select your Permits
   1. Accept the Project Terms by checking the checkbox.
   2. Select a permit. Tertius displays all open permits for the address. Select any available permit for which you want inspections. Permits for which an agency has already been assigned are also listed, but you cannot select them. The scope and the list of inspection types for that permit are displayed.

Check the permit numbers.

☐ P1903248
  Cannot be picked, has Agency assigned already

Back   Add Details

Check the permit numbers.

☐ **B2101808**

☐ **B2101926**

Back   Add Details

3. Select the Add Details Button

Step 3: Specify Inspection Details
1. **When**: Select when you need the inspection. Select:
   a. Short-term projects: Add preferred time period.
   b. Long-term projects: Add preferred time period.
2. **Additional information**: Add relevant details for the inspection agency. For example, "Project will be phased," "Project may have a conditional occupancy," etc.
3. **Site contact**: Add contact information for the person responsible to meet the inspector at the construction site.
   a. Name
   b. Email Address
   c. Phone Number: format +1 XXX-XXX-XXXX
4. Select **Review Project Details**: Review and/or edit your entry.
5. If all project details are correct, select **Find an Inspector**.

REVIEW AND CONFIRM REQUEST
Check the details of the project you created.

📍 **ADDRESS**
73 G
ST
SW

👤 **CUSTOMER**
John Doe

SELECTED PERMITS

BUILDING B2101808

Inspection types (25)   ⌄

This permit includes
TEST Renovating Bathroom and Shower

Edit Permits

PROJECT TIMELINE

Short-term

📅 Oct 3, 2021 - Oct 9, 2021

Edit Time

SITE CONTACT

Mary Smith

✉ mary@email.com

📞 +12345678998

Edit Site Contact

Step 4: Browse Agency Profiles

1. Below the project details, find a list of available third-party agencies. All agencies listed have the qualifications for the inspection services you specified.
2. Find buttons for each agency depending on services available: Cost per Inspection, Proposal, or both. Select the best option:

a. **Cost per Inspection** construction is more suitable for:
   - Small projects or
   - Small number of permits, and
   - When you need the inspection to be scheduled **as soon as possible**.
   - See the price list and project terms for these projects by selecting the Cost per Inspection button.
   - Once the third-party agency uploads the inspection reports, payment will be due immediately.
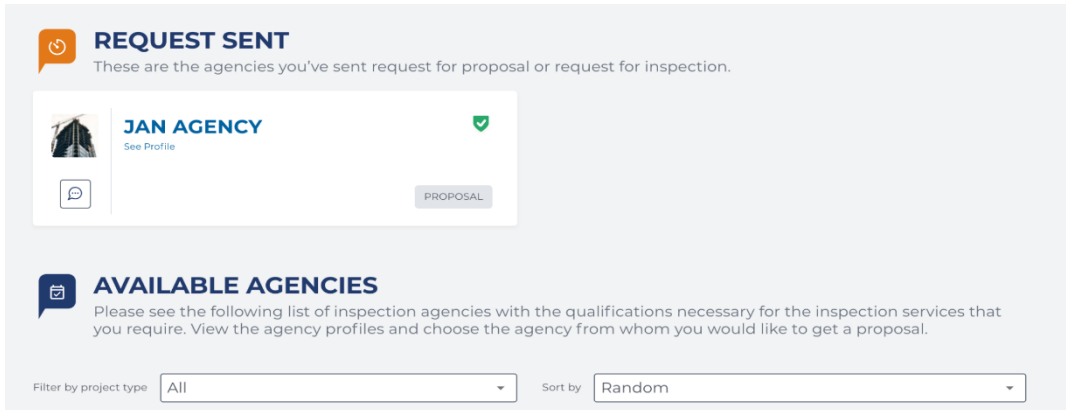

b. **Proposal Based**
   - Send **multiple requests at a time** to selected agencies based on the profile.

   - Select Request Proposal and Confirm.

3. Your request was sent to the third-party agency. Find a list of agencies you requested a proposal from in the Requests Sent section.

4. Review your received proposals and accept the agency that best suits your needs.
5. Find all projects and explore details and statuses under Projects.

Manage Projects

Once you have selected your inspection agency and accepted a proposal, view and manage your projects under My Projects. My Projects is organized by tab:

● **Pending**

   Find a list of projects you requested proposals for but have not yet accepted here. It also shows projects for which you have requested a Cost per Inspection project and the agency hasn't accepted your request. Review the search results of available inspection agencies for a project by selecting See Inspectors.
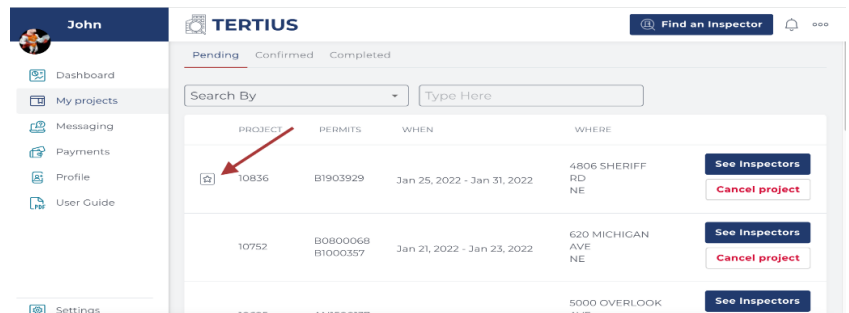
● **Confirmed**

   Find a list of projects for which you have received and accepted the proposal. Select the View and Manage button to explore details and contact the third-party agency to schedule an inspection.

● **Completed**

   Find a list of finished projects. Find details by selecting the Details button.
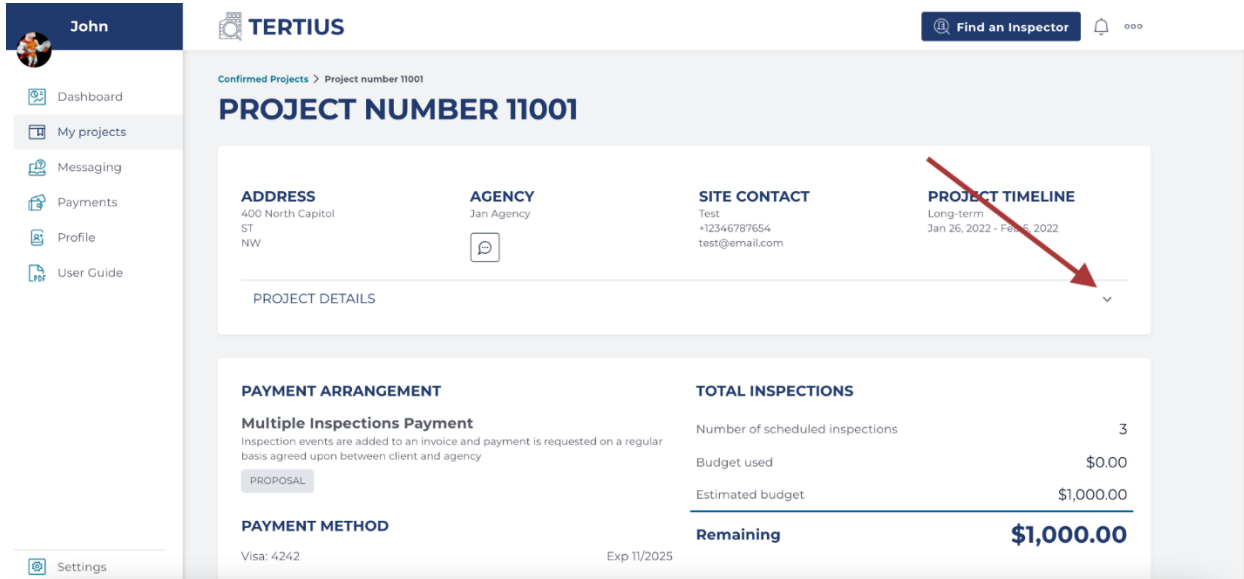
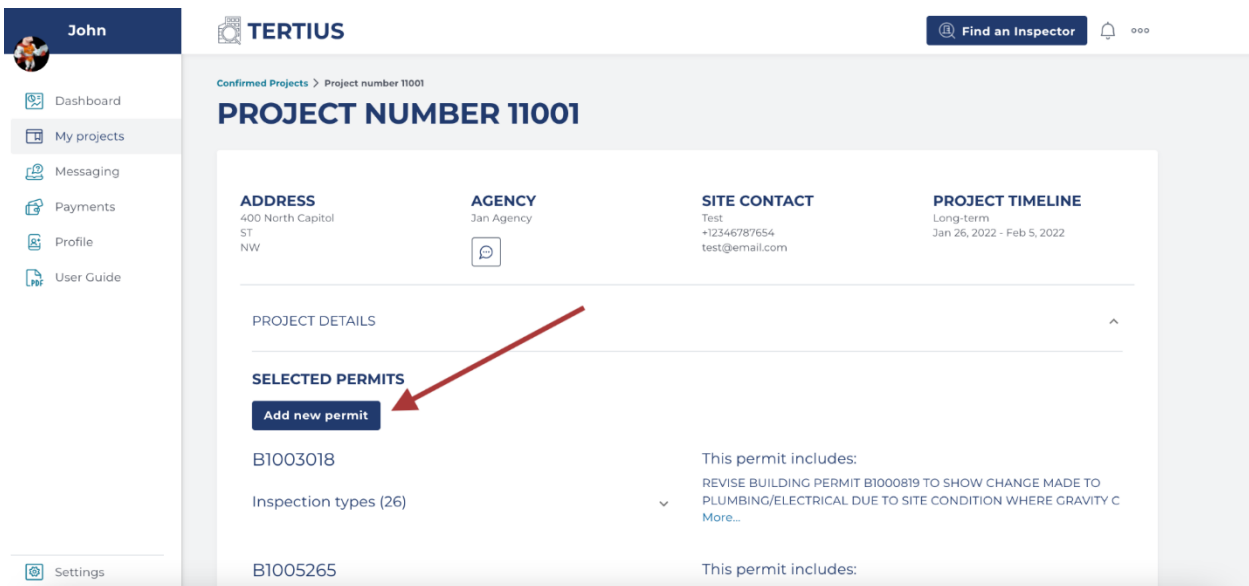The star icon next to a project means that it is a Special Inspection project.

Add New Permit to an Existing Project

Using Tertius, you can add a new permit to an existing project by submitting a request to the third-party agency. The new permit has to be for the same address as the project.
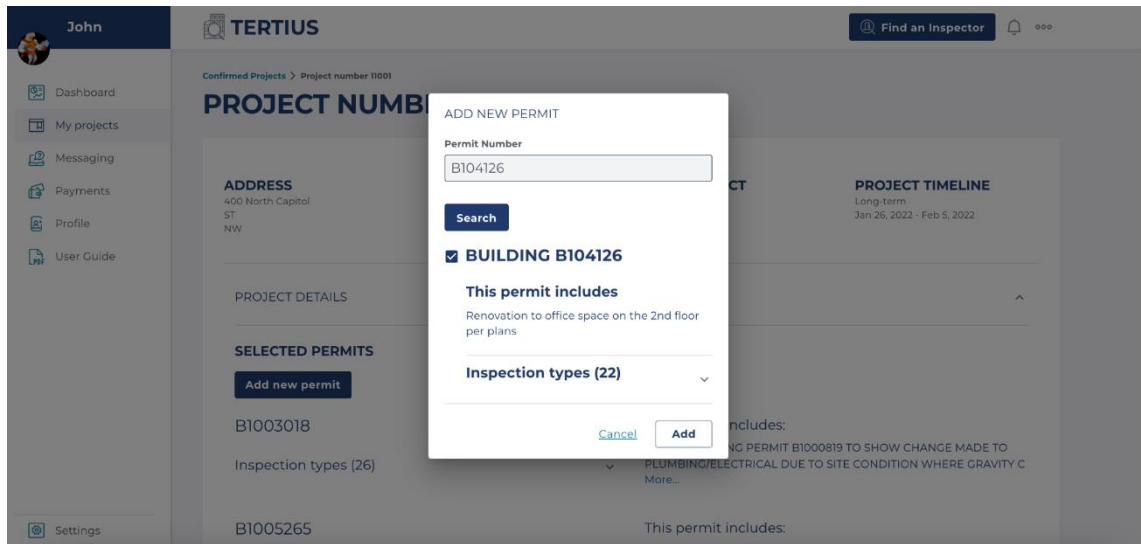
1. Open the Project Details on your project page.

2. Select Add New Permit.

3. Type the number of the permit you want to add and select Add.
4. You will receive an email notification when the third-party agency has accepted/rejected your request.

Cancel a Project

Steps

Projects may be canceled BEFORE an inspection is scheduled.
- If you **have not accepted a proposal for the project**, cancel by selecting the Cancel Project button next to it under the Pending tab.
- If you **accepted a proposal for the project, but no inspection event has been scheduled, select** the View and Manage button next to it under the Confirmed tab. On the project page, select Cancel Project. Provide an explanation for the cancellation and select Cancel.
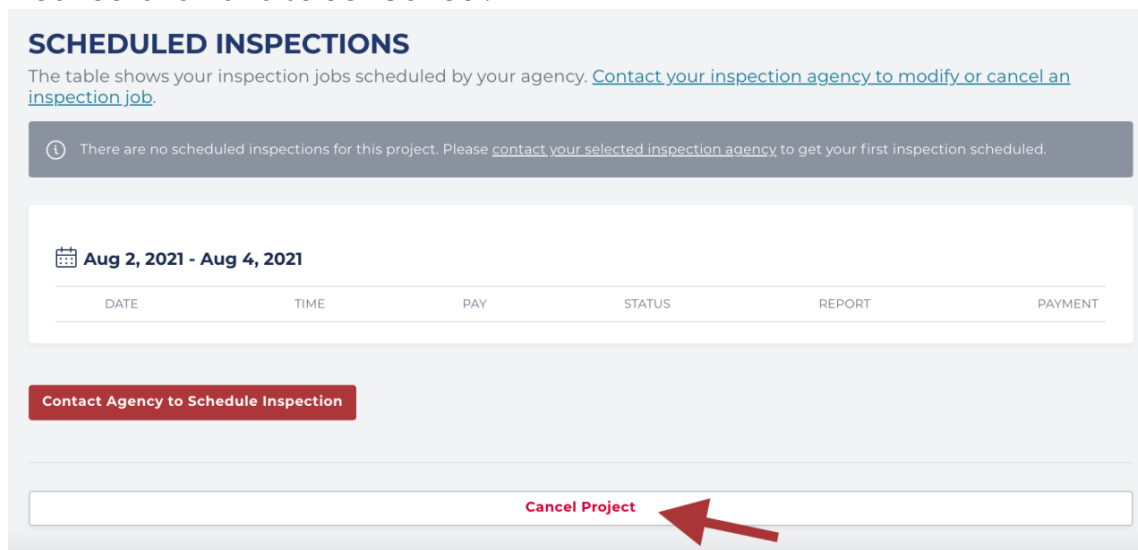
- If you **accept a proposal for the project and there is an inspection event scheduled,** only DOB can cancel the project. Select the View and Manage button next to it under the Confirmed tab. Then, select Cancel project. Complete the form, including an explanation for the cancellation. Then, select Request Cancel. DOB will review your cancellation request and make a determination. Per DOB policy, a project cannot be canceled or a change in inspection agencies may not be made once a third-party inspection agency begins a project.

SCHEDULED INSPECTIONS

The table shows your inspection jobs scheduled by your agency. Contact your inspection agency to modify or cancel an inspection job.

📅 **Jun 25, 2021 - Jul 30, 2021**

DATE	TIME	PAY	STATUS	REPORT	PAYMENT
Jul 6, 2021	7:00am - 11:00am	$0.00	In Progress	Open Report	

Contact Agency to Schedule Inspection

Request Cancel Project

When there is inspection scheduled, the project may only be canceled by an administrator

Describe why you need to cancel this project

Type here...

0/1000

Request

Manage and Accept Proposals

Requirements

- Get to Know Your Dashboard
- Find an Inspector
- Send a Message
- Submit a Payment

Steps

Find proposals from third-party and special inspection agencies on your Dashboard under Received Proposals. The card displays the project number, permits, and third-party agency.

1. Select See Proposal.
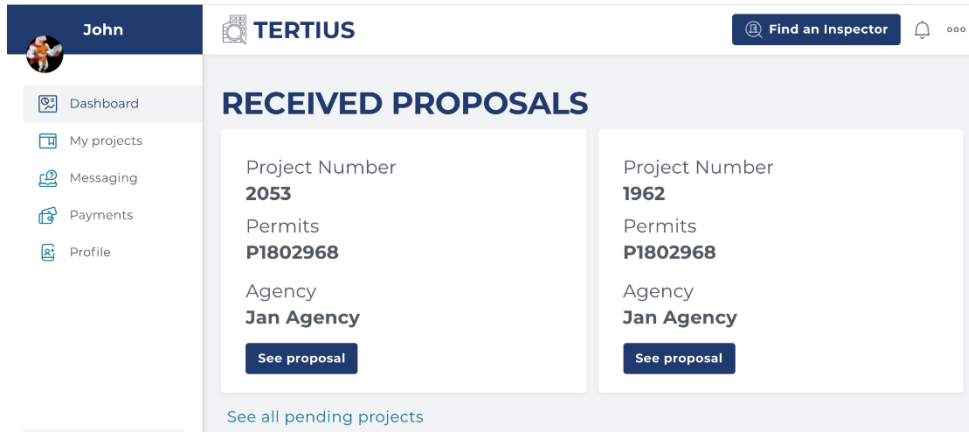2. View the detailed information provided in the proposal, including the type of [payment arrangement](#). Find the information you entered when submitting the proposal request. Contact the third-party or special inspection agency if you would like to have further communication with them about the proposal as indicated in the image below.

3. Following proposal review:
   a. **Accept** it: select Accept Proposal and complete the checkout process. Find details related to the payment process in the [Submit Payment](#) section. Following checkout, find details of this project under Confirmed Projects.

b. **Reject** it: Select Reject proposal and confirm.

Send a Message

Chat with any third-party or special inspection agency already contacted and find previous conversations under Messaging. Locate prior conversations using the Search Messages field.

Inbox

Find contacts for any project under Inbox. To start a conversation, select the contact card and type in the chat box. Check Include an Admin to copy DOB on the conversation. To move a conversation from the Inbox to Archived, select Archive This Conversation.

Archived

Find your archived conversations under Archived. Select a contact card to view the conversation and the Restore This Conversation link to move it back to the Inbox.

Special Inspections

Customers who require regular inspections will find an inspector using a different procedure than those who require special inspections.

In general, use the Special Inspections workflow to find a Special Inspection Agency and create a project once you have a permit number regardless of issuance. Otherwise, the Regular Inspections workflow is appropriate. If you are unsure of whether you need Special Inspections contact the project's structural engineer or, contact DOB Customer Service at 202-671-3500 or DOB@dc.gov.

Find instructions on how to initiate regular inspections in the Regular Inspections section.

Find an Inspector

To find an inspector, first create and submit a project by following the steps below.

**Requirements**

- [Log In To Tertius](#)

Steps

Step 1: Search for an Inspector:
1. Select the Find an Inspector button.
2. Search by Permit Number in the Special Inspections section.
   a. Conduct a permit-based search. Enter your permit number or numbers divided by commas. All permits must be under the same address.
   b. Special inspection agencies must be contacted when the application screening is successful and plan review starts. Note: DOB will review the Special Inspection pre-construction documents after structural drawings are approved.
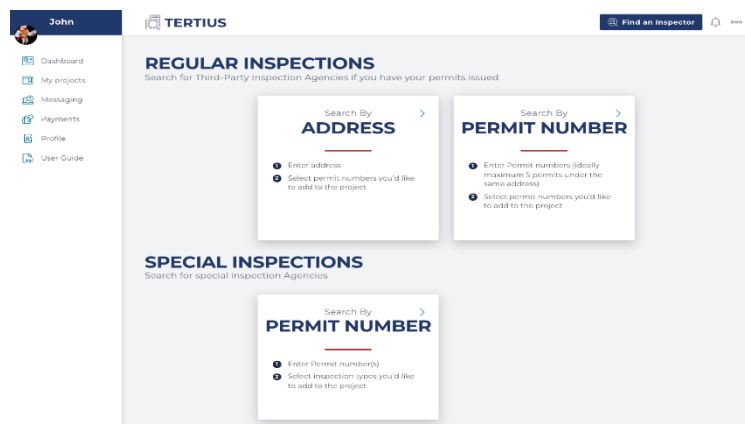
Step 2: Select Your Permits
1. Accept the Project Terms by checking the checkbox.
2. Select a permit. Tertius displays all issued and non-issued permits in the plan review phase for the address: Select any available permit. The scope and the list of Special Inspection types for that permit are displayed. Regular Inspection types for a permit are not displayed in the Special Inspections flow.
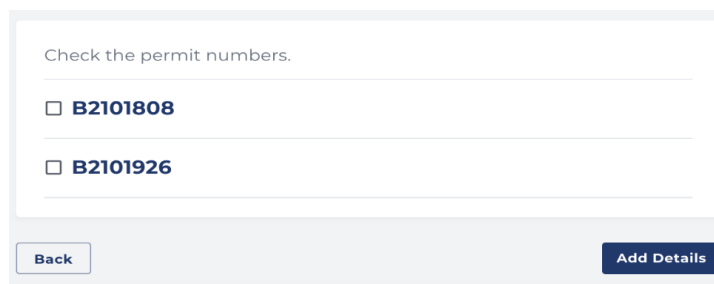
3. Select the Add details button.

Step 3: Specify Inspection Details
1. **Project Scope**: Describe the scope of your project in one sentence. This might be useful if more special inspection agencies work on the same permit, and you'd like to define the scope for each one of them
2. **When**: Select the period when you'll need the special inspections to be performed.
3. **Project Documents:** Share the links of the documents that might be necessary for the agency. Add the name of the document and copy and paste the website address, or URL, where it can be found.
   a. Required:
      i. Latest construction drawings. Make sure to include the structural drawings.
   b. Optional
      i. Specs
      ii. Schedule of Special Inspections
      iii. Geotech Report
      iv. Project Schedule

4. **Project Details:** Describe any details that might be useful for the agency. The following information can help:
   a. New Construction or Renovation
   b. Building Use
   c. High or Low Rise
   d. Foundation Type
5. **Contact Person:** Add contact details of the person the agency can reach out to for project questions.
   a. Name
   b. Email Address
   c. Phone Number: format +1 XXX-XXX-XXXX
6. Click on **Review Project** Details.
7. If all project details are correct, select **Find an Inspector**.
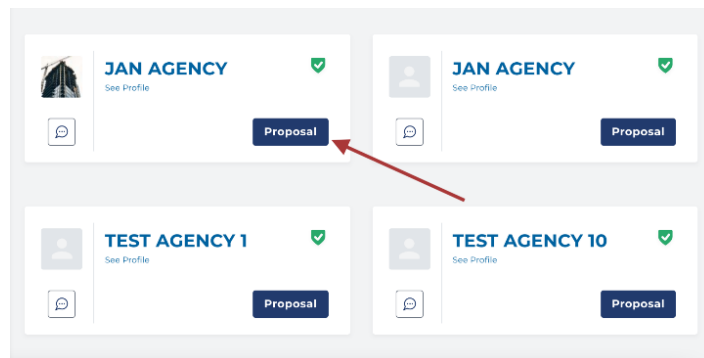
Step 4: Browse Agency Profiles

1. Below the project details, find a list of available special inspection agencies. All agencies listed have the qualifications for special inspection services.
2. Select the agency you'd like to request a proposal from. The default order of the agencies is random.
    a. Type the name of the agency you'd like to find, or
    b. Sort the agencies A-Z or Z-A
3. Request a proposal from an agency or multiple agencies.
4. Select Confirm to send the request.

PROPOSAL

(i) You can request a proposal from the agencies and accept the one that is the best for you.

You are about to send
JAN AGENCY
a request for proposal for
PROJECT NUMBER 10836

Cancel   Confirm

Manage Projects

Once you have selected your inspection agency and accepted a proposal, view and manage your projects under My Projects. My Projects is organized by tab:

Pending

Find a list of projects you requested proposals for but have not yet accepted here. It also shows projects for which you have requested a Cost per Inspection project and the agency hasn't accepted your request. Review the search results of available Inspection Agencies for a project by selecting See Inspectors.

Confirmed

Find a list of projects for which you have received and accepted the proposal. Select the View and Manage button to explore details and contact the third-party agency to schedule an inspection.

Completed

Find a list of finished projects. Find details by selecting the Details button.

The star icon next to a project means that it is a Special Inspection project.

Add New Permit to an Existing Project

Using Tertius, you can add a new permit to an existing project by submitting a request to the third-party agency. The new permit has to be for the same address as the project.

Open the Project Details on your project page.
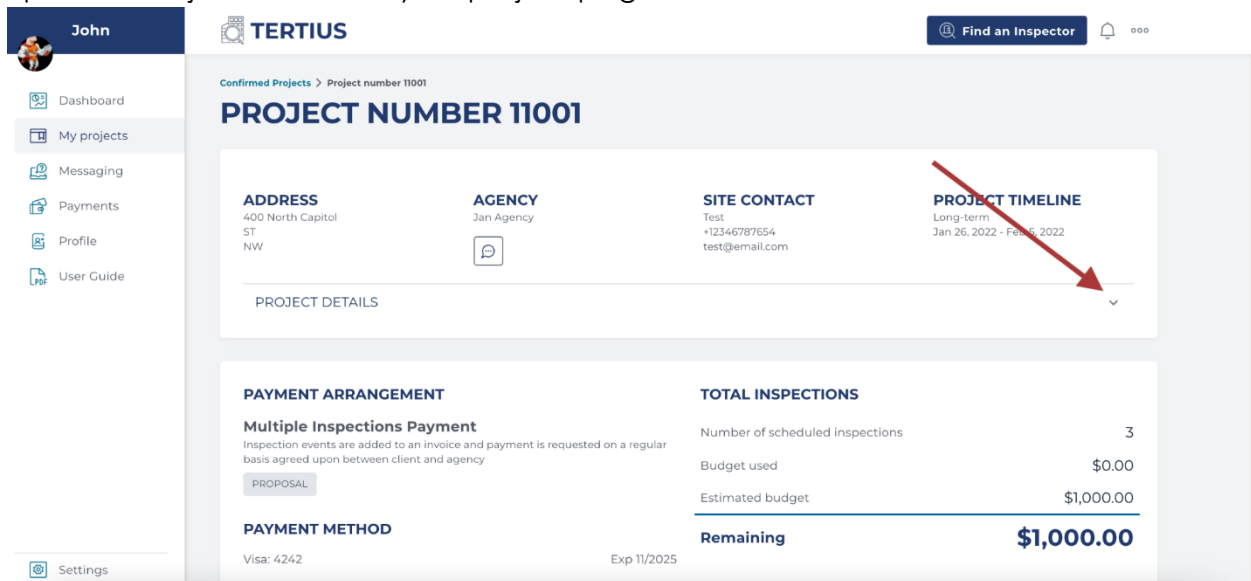
Select Add New Permit.
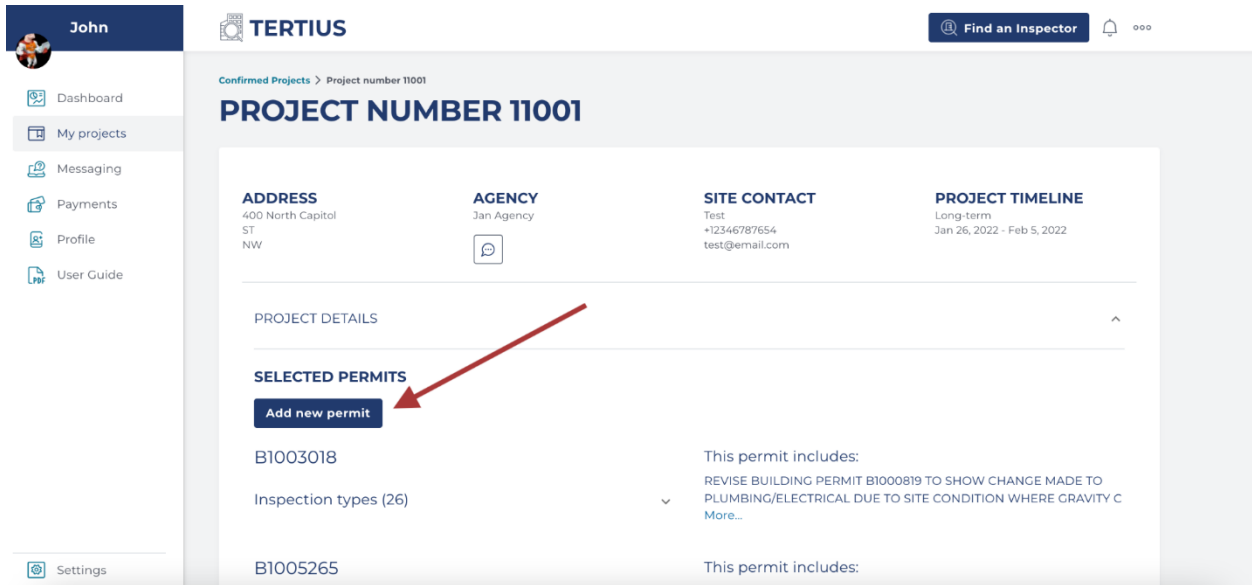
Type the number of the permit you want to add and select add.
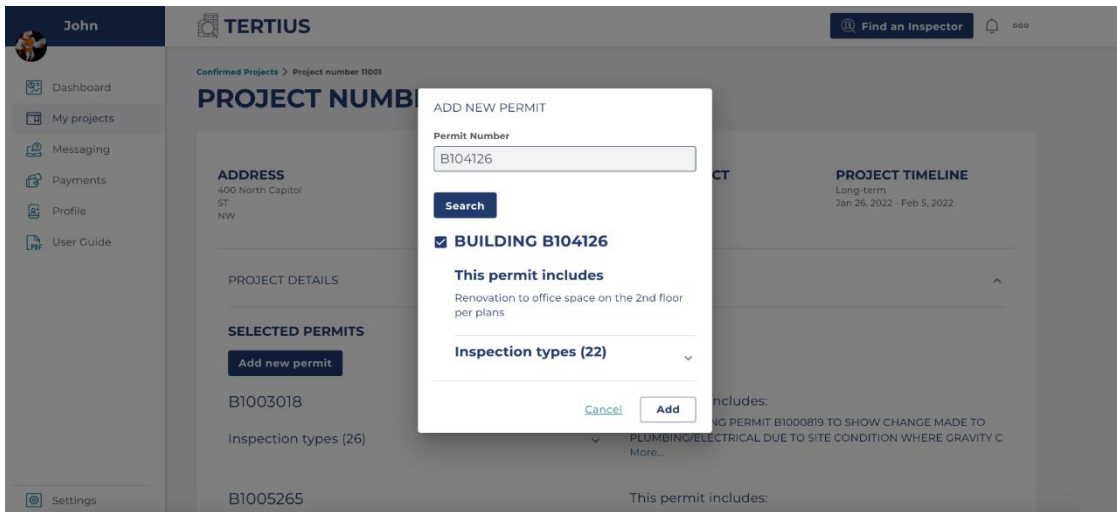
You will receive an email notification when the third-party agency has accepted/rejected your request.

Cancel a Project

Steps

Projects may be canceled BEFORE the Special Inspection Meeting Minutes have been accepted by DOB.
- If you **have not accepted a proposal for the project**, cancel by selecting the Cancel Project button next to it under the Pending tab.

- If you **accepted a proposal for the project, but the Special Inspection Meeting Minutes haven't been accepted by DOB**, select the View and Manage button next to it under the Confirmed tab. On the project page, select Cancel Project. Provide an explanation for the cancellation and select Cancel.

- If you **accepted a proposal for the project and the Special Inspection Meeting Minutes have been accepted by DOB**, only DOB can cancel the project. Select the View and Manage button next to it under the Confirmed tab. Then, select Cancel project. Complete the form, including an explanation for the cancellation. Then, select Request Cancel. DOB will review your cancellation request and make a determination. Per DOB policy, a project cannot be canceled or have a change in inspection agencies once the Special Inspection Meeting Minutes have been accepted by DOB.

Manage and Accept Proposals

Requirements

- [Get to Know Your Dashboard](#)
- [Find an Inspector](#)
- [Send a Message](#)
- [Submit a Payment](#)

Steps

Find proposals from third-party and special inspection agencies on your Dashboard under Received Proposals. The card displays project number, permits, and third-party agency.

1. Select See Proposal.

2. View the detailed information provided in the proposal, including the type of payment arrangement. Find the information you entered when submitting the proposal request. Contact the third-party or special inspection agency if you would like to have further communication with them about the proposal as indicated in the image below.

PAYMENT ARRANGEMENT

Multiple Inspections Payment
Inspection events are added to an invoice and payment is requested on a regular basis agreed upon between client and agency

ESTIMATED BUDGET
$100.00

test

Project Details   ⌄

Please contact us if you have any questions or need more information. Otherwise, you may accept our proposal and finalize booking your inspection.

Reject proposal   Accept Proposal

Thank you for your business.

Jan Agency   💬

3. Following proposal review:
    a. **Accept** it: select Accept Proposal and complete the checkout process. Find details related to the payment process in the [Submit Payment](#) section. Following checkout, find details of this project under Confirmed Projects.

    b. **Reject** it: Select Reject Proposal and confirm.

Send a Message

Chat with any third-party or special inspection agency already contacted and find previous conversations under Messaging. Locate prior conversations using the Search Messages field.

Inbox

Find contacts for any project under Inbox. To start a conversation, select the contact card and type in the chat box. Check Include an Admin to copy DOB on the conversation. To move a conversation from the Inbox to Archived, select Archive This Conversation.

Archived

Find your archived conversations under Archived. Select a contact card to view the conversation and the Restore This Conversation link to move it back to the Inbox.

Legacy Projects (Projects Initiated Before Tertius)

All permits that were issued prior to the launch Tertius on November 1, 2022 must be moved onto the Tertius platform, however, the payment process can continue outside of Tertius for these projects.

Changes To Address Legacy Projects In Tertius

The address and permit search in Tertius provides additional information. If there is a condition on the permit placed by a third-party inspection agency, the user will see when a Notice of Intention authorizing the agency to conduct inspections was completed.

Clients can create a project in Tertius with permits under the same address that were authorized to the agency selected before November 1, 2021, with the following conditions:

- No payment information is requested for legacy projects
- Clients can only choose the already authorized agencies
- Clients don't need to request a proposal, they can book the agency right away

Creating A Legacy Project

1. Select the Find an Inspector button.
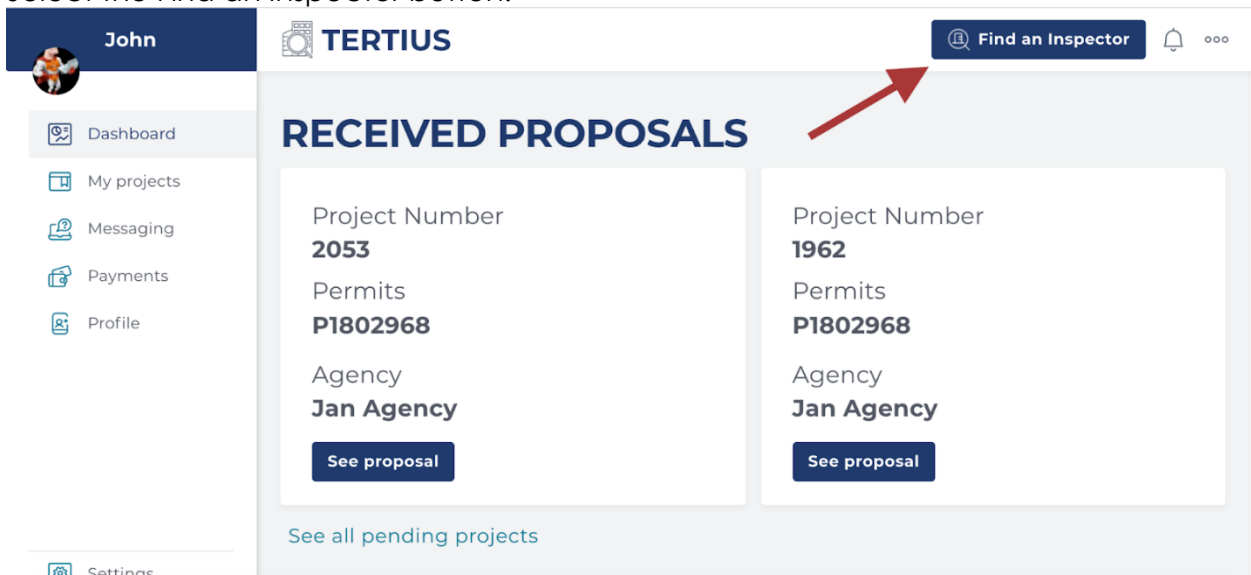
2. Select Regular Inspections.

3. To Conduct an Address-Based Search
    a. Complete the form with the address of the property under construction and Tertius will provide a list of associated open permits.
    b. Fields include:
        • Street Number
        • Street Number Suffix
        • Street Name - If the address is a numbered street, please include the "th", "rd", "st", etc. as in 4th Street SW. If the street name includes North, S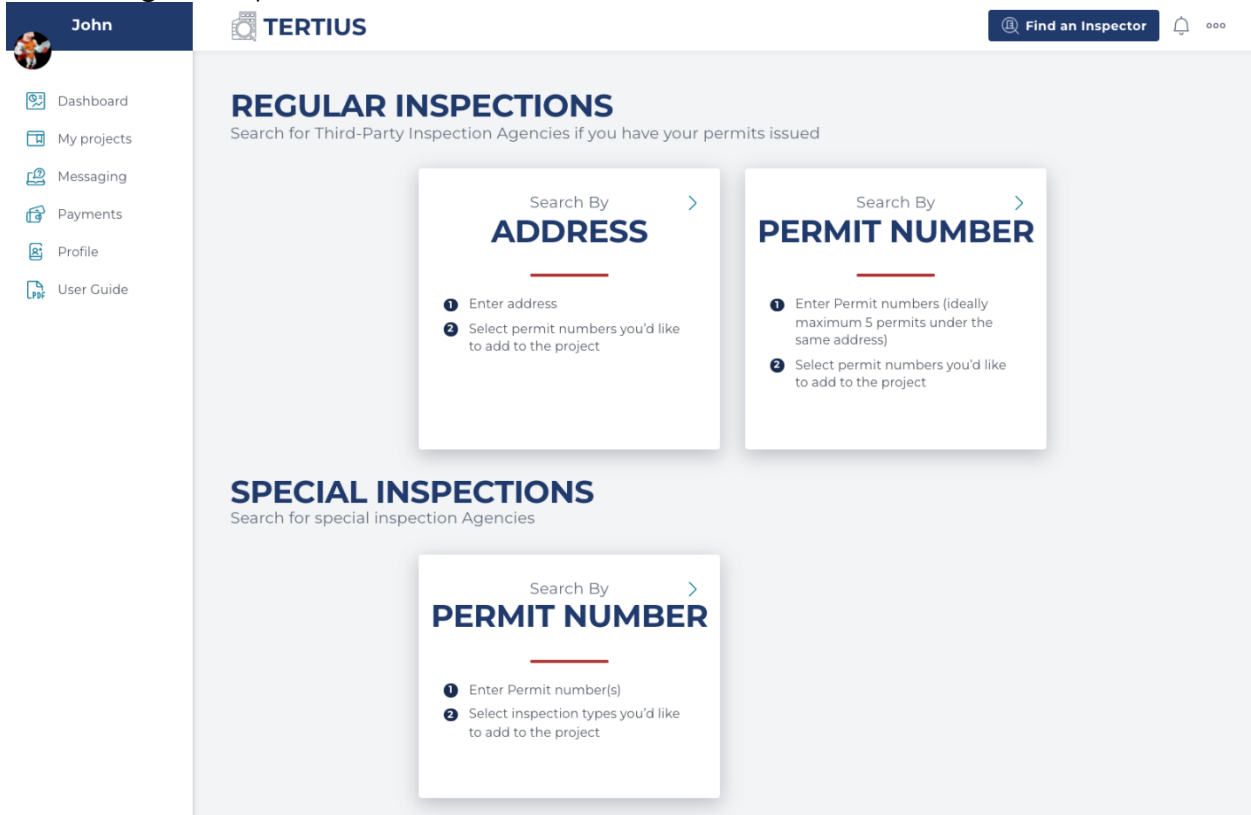outh, East or West, spell out the words, e.g. North Capitol. Please use the full street name, abbreviations are not accepted.
        • Street Type
          Unit Number
        • Quadrant
        • Zip Code

4. Or, To Conduct a Permit Based Search
    a. Enter your permit number or numbers, divided by commas.
    b. All permits must be under the same address.

5. Select your permits
    a. Accept the Project Terms by checking the checkbox.
    b. Select a permit. Tertius displays all open permits for the address. Select a legacy permit (a permit authorized to an agency before November 1, 2021).

6. Once you've selected a legacy permit, you can only add permits that are also legacy permits and that are authorized to the same agency.
   a. Click on Add Details
   b. Fill out additional information
   c. Click on Review Project Details
   d. If all details are correct click on Find an Inspector
   e. On the results screen you'll see the third-party agency that is already authorized on the permits you've added to your project
   f. Click on Book Agency
   g. The legacy project is now created. The project appears under your Confirmed projects, with the label "Legacy Project".

Submit Payment

Requirements

- [Get to Know Your Dashboard](#)
- [Find an Inspector](#)
- [Manage and Accept Proposals](#)

Payment Arrangements

Proposal Based Projects

There are two payment arrangement types, which the third-party agency specifies in the proposal:

- **Multiple Inspections Payment**: The client pays for inspections in groups or by phase as agreed upon with the third-party agency. Only Special Inspection projects can use this payment method.
- **Single Inspection Payment**: The third-party agency requests payment after each inspection event. Note that this option is only available for regular inspections.

Cost Per Inspection Projects

Cost per Inspection projects are always Single Inspection Payment: The third-party agency will request payment after each inspection event.

Payment Methods

There are two payment method options:

- **Credit Card**: Enter card information and the payment will be charged accordingly.
- **eCheck** (or ACH: Automated Clearing House): Add bank account information and the payment will be electronically transferred from your account to the third-party agency's. Both methods require a transaction fee, but eCheck is lower (no more than $5). Because of the lower fee, eCheck is a better option for larger payments.

Add a Credit Card
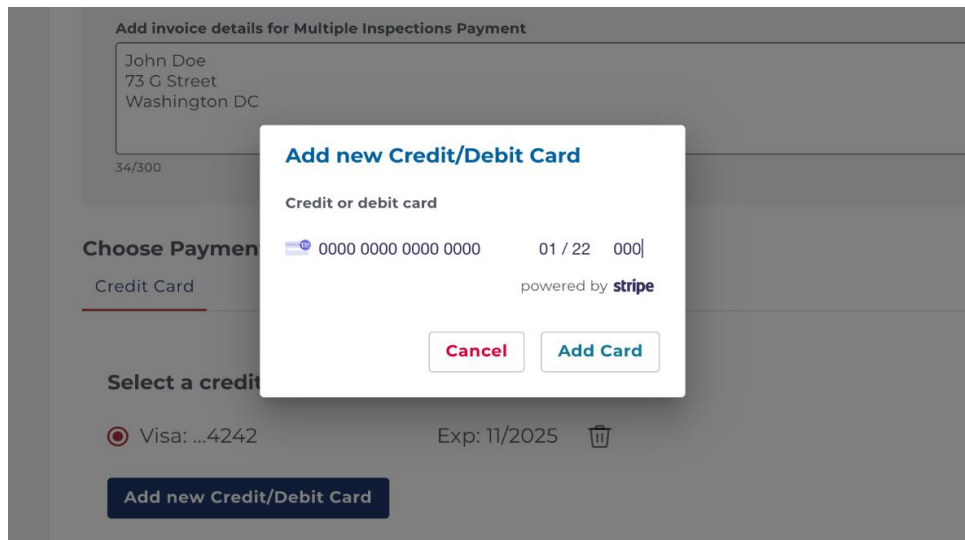
Depending on the payment method, you must add either a credit card for credit card payment or a bank account for eCheck payment.

Steps

1. Go to Payments, select the Payment information tab.
2. Select Add new Credit/Debit Card, enter your credit card number, expiration date, and CSV.
   Select Add Card.

3. Find all cards entered on your payment information page. Delete a card by selecting the trashcan icon next to it and confirming.

Connect New Bank Account

Select Connect a New Bank Account, choose your bank, and follow the instructions.

Edit Your Profile

Requirements

- [Register for Tertius](#)

Steps

To edit your profile, complete the fields:

- **Profile Photo**: Upload a profile photo (5 MB max). Your photo can be changed anytime.
- **First Name**
- **Last Name**
- **Company Name**: Add the name of the company you represent (if there is one) to help the agencies identify you as a client.
- **Contact Phone**
- **Email**

User Roles

User roles make it possible for clients and third-party inspection agencies to have multiple user profiles with access to the projects of the company or agency.

Basic Concepts

There are no predefined roles, the permissions can be freely customized for each user. There are recommendations for roles for clients, e.g. Administrator, Project Manager, and Accounting) and for agencies, e.g. Administrator and Accounting, but the permissions of these roles are also fully customizable.

The concept of a "Company" has been introduced to Tertius. Only companies can invite new users to join them.

When the roles feature was introduced in Tertius, existing agencies were converted to companies. Clients remain the same.

Inviting Users To An Agency

The account owner of the agency can invite new users to participate. They can invite new users who do not have an account in Tertius, or users who already have an account on Tertius, but do not have any projects associated with their account. Agencies cannot invite existing Tertius users who already have projects.

Inviting Users To A Company

Any user with a client account can decide to create a company and invite users to the company. They can invite users who do not have an account on Tertius, or users who already have an account on Tertius – with or without projects on their accounts. Users who have already created a company cannot be invited to join another company.

Joining A Company As A User With Existing Projects

If a user is invited to a company and they accept the invitation, they may join the company on the following conditions:
- The payment methods defined before joining the company WILL NOT be shared with the company.
- Users in the company who have "See All Projects" permissions will see their projects.
- Users in the company with both "See All Projects" and "Manage Projects" permissions will be able to manage their projects.

- The user's role and permissions will be defined by the company user who has "Invite Users And Assign Roles" permission.
- If the user leaves the company, their projects will remain the property of the company and their Tertius account will be empty.

Roles And Permissions

Invite Users And Assign Roles
The user can invite new users to the company, assign them roles, and change the permissions of existing users.

Access To All Projects
The user has access to all projects associated with the company. The permission is view only: the owner cannot perform any actions on the projects.

Assign Owner To Projects
The user can assign owners to new projects, or change ownership of older projects. This permission is only available for users who have the permission "Access To All Projects."

Set Up Payment Information
The user can set up credit cards or bank accounts that can be used to make payments on the projects associated with the company. The credit card and bank account information is only available for these users.

View Transactions
The user has "See And Download Information" permission regarding the payment transactions associated with any project of the company.

Approve Payment Requests
The user can approve any payment request in any of the projects of the company. To see all project details, the user needs the "Access To All Projects" permission also.

Manage Projects
The user has the following permissions for their own projects:
- Create Projects
- Accept Proposals
- Add New Permit To An Existing Project
- Cancel A Project
- Request Project Cancellation From DOB

The user needs the Access to all Projects permission to be able to manage any of the projects of the company.

Agencies

Invite Users And Assign Roles
The user can invite new users to the agency, assign roles, and change the permissions of existing users.

Assign Owner To Projects

The user can assign owners to new projects or change the ownership of old projects.

Set Up Payment Information

The user can set up all the merchant accounts for the agency.

View Transactions

The user can see and download payment transaction information for any project of the agency.

Manage Payment Requests

The user can create a payment request for any of the projects of the agency.

Update Agency Profile

The user can change anything in the overall agency profile.

Manage Projects

The user has the following permissions:
- Create proposals
- Accept a cost-per-inspection project
- Accept new permit addition
- Request permit complete
- Cancel projects
- Request project cancellation from DOB

Manage Reports

The user can edit any of the reports of the agency.

Upload Special Inspection Documents

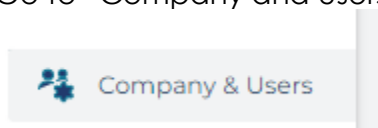The user can upload documents to special inspection projects.

Schedule Inspections

The user can schedule inspections on any of the projects of the agency.

Setting Roles And Permissions For Invited Users
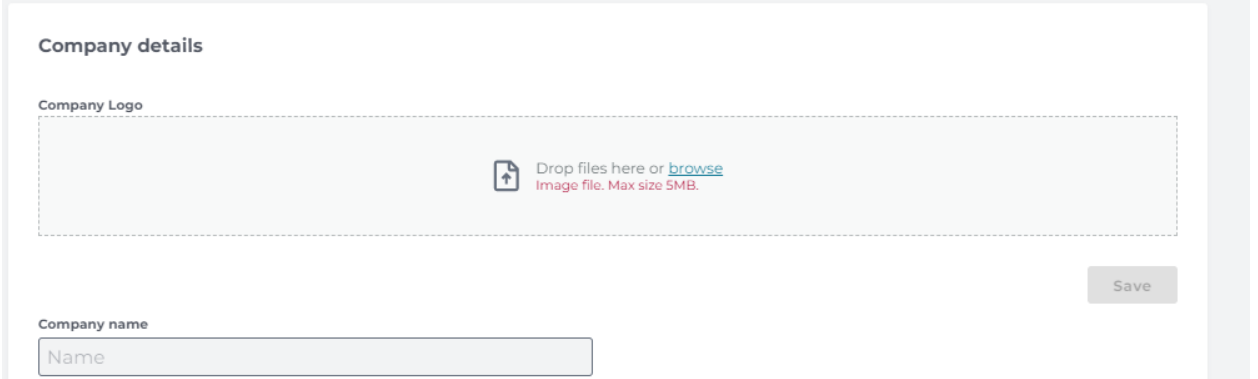
Clients

1. Go to "Company and Users".

2. Create a company.

3. Click On "Add New User".

4. Add the email address of the person you would like to invite.
5. Choose the role you want to give the person. If you choose one of the three predefined roles - Administrator, Project Manager, or Accounting – you will the permissions selected. You may also customize any of these roles to meet your needs. If you choose the custom option, add a name for this custom role, and choose the permissions you would like to add.

Agencies

1. Go to "Agency & Users".
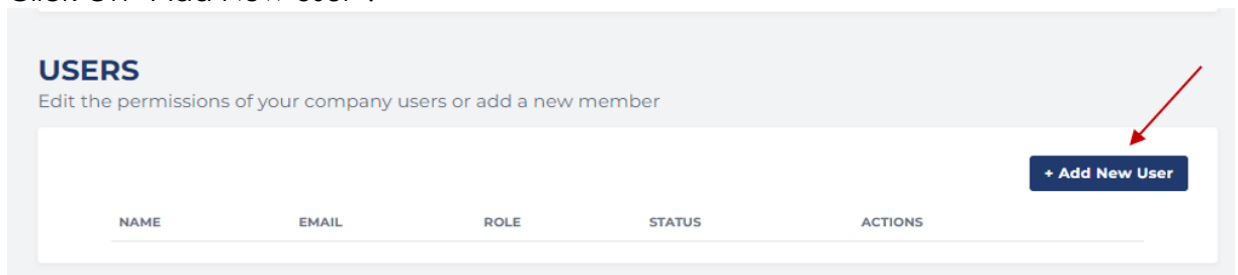
2. Click on "Add New User".

USERS
Edit the permissions of your company users or add a new member

+ Add New User

NAME	EMAIL	ROLE	STATUS	ACTIONS
-	test_ag10@niepodam.pl	Company Creator	accepted	**Permissions**
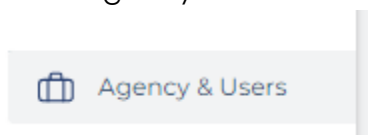
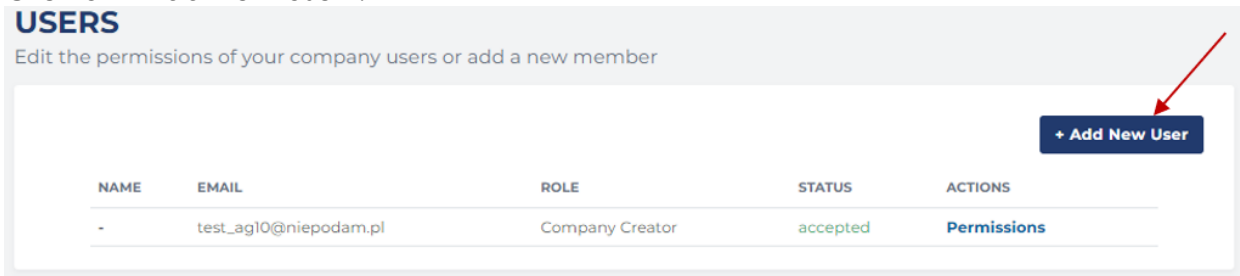3. Add the email address of the person you'd like to invite.
4. Choose the role you want to give the person. If you choose one of the two predefined roles - Administrator or Accounting – you will see the permissions selected. You may also customize any of these roles to meet your needs. If you choose the custom option, add a name for this custom role, and choose the permissions you would like to add.

Remove Users From Agency/Client Company

Any user with "Invite Users and Assign Roles" permission can delete users. A user cannot be deleted if they are a project owner on any projects

Project Owner

Once a company is set up in Tertius, all projects must have a project owner. Projects may also be created before a company is setup.

Client

The owner of the projects created before a company is setup is the user who originally created the project.

Agency

The owner of the projects is the user who originally created the project.

Projects Created After A Company Is Setup

Client

Once a company is created, users with "Manage Projects" permission can create projects. The project creator can choose the project owner at the "Additional Information" step of project creation. By default, the user creating the project is the owner. Anyone with the "Manage Projects" permission can be selected from the dropdown list.

Agency

Any user at the agency with "Manage Projects" permission can answer a request for proposal. By default, the user who creates the proposal is the owner. During proposal

creation, the user can select any member of the agency with "Manage Projects" permission to be the owner of the project.

Change Project Owner

Client

Any user in the client company who has "Assign Owner To Projects" and "Access To All Projects" permissions can change the project owner on any project.

1. Go to My Projects and choose "Confirmed" Or "Completed Projects".
2. Select the project where you'd like to change the owner, and click on "View And Manage".
3. Click on "Change Owner".
4. Select the user you want to be the new project owner.

Agency

Any user in the agency who has "Assign Owner To Projects" permission may change the project owner on any project of the agency.

1. Go to "My Projects" and choose "Confirmed" Or "Completed Projects".
2. Select the project where you would like to change the owner, and click on "View And Manage".
3. Click on "Change Owner".
4. Select the user you want to be the new project owner.

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