

Project Team Quick Reference Guide

This topic provides a reference for the Project Center **Project Team** activity center.

Purpose

Use the **Project Team** activity center to assemble and manage a unique team for each project based on who participates in the project. Assemble your project team by assigning contacts from the Project Center Contacts database to your project team. Organize and group team members to facilitate communication between internal and external team members when using functions such as transmittals, submittals, action items, and Newforma Info Exchange.

Audience

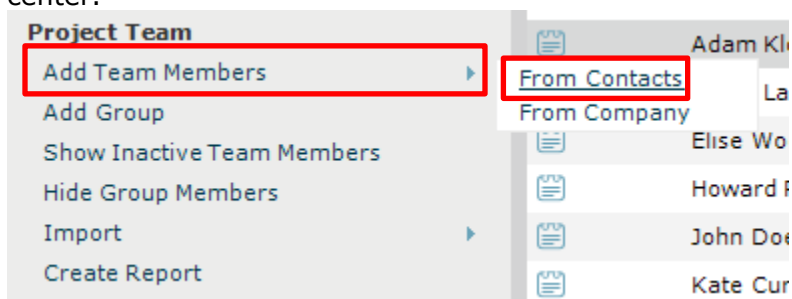
Internal project team members.

Key Features

- Create a unique team list for each project.
- Group team members to organize and facilitate communication.
- Modify contact information for project team members.
- Establish access to your Info Exchange website for the project and assign permissions.

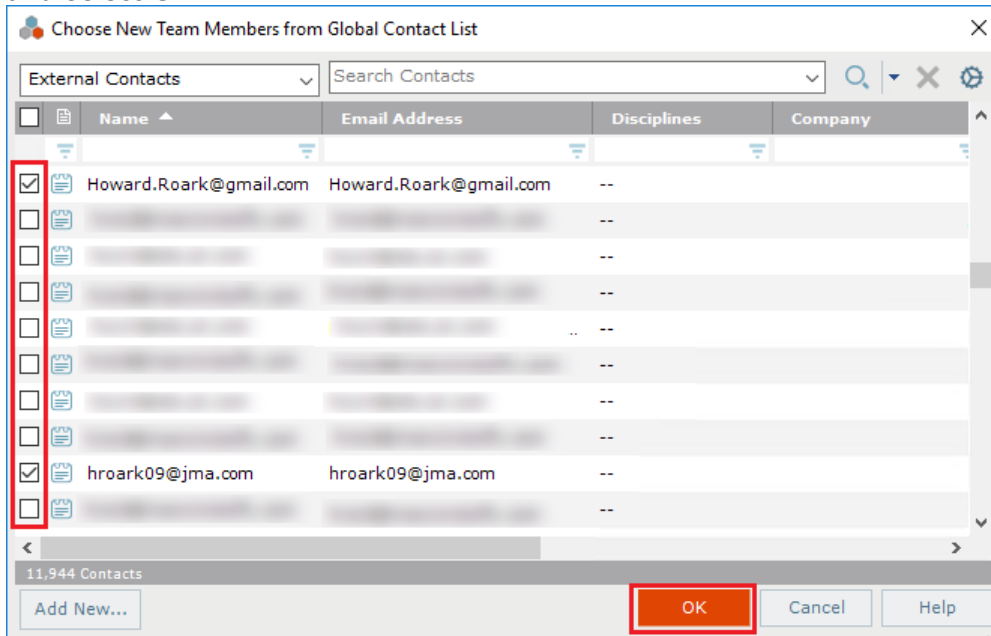
To add people to the project team

1. Select **Add Team Members > From Contacts** from the **Tasks** panel in the **Project Team** activity center.

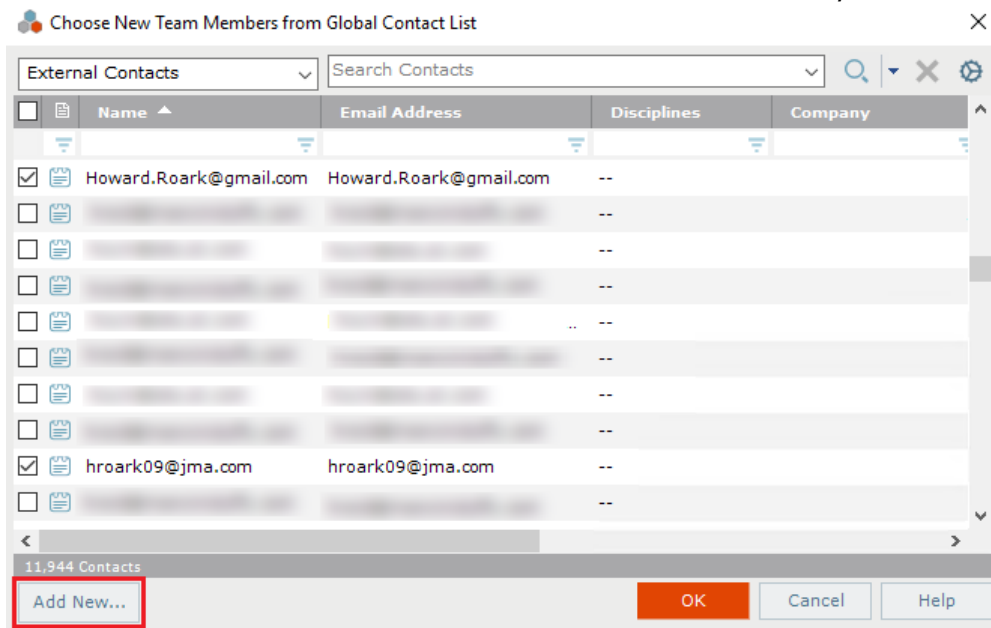


Select **From Company** to select from a list of contacts by company.

2. Select team members in the **Choose New Team Members from Global Contact List dialog box** and select **OK**.



3. Click **Add New** to add a new team member that is not already in the contacts database.



4. In the **Add New Project Team Member dialog box**, enter either a valid and unique **Email Address** or a **First Name** and/or **Last Name**. Fill in any other contact information you wish and click **OK**.

Add New Project Team Member

Contact Information | Contact Notes | Custom Fields | Project Roles and Permissions | Change Log

This contact information is used across all projects.

Email Address:

First Name:

Last Name:

Disciplines:

Job Title:

Department:

Roles:

Culture:

Company

Company: Edit

Office Location:

Numbers

Work:

Mobile:

Home:

Fax:

Show in Contact Lists

Status: Active Inactive

Source:

Address

Use Office Address:

Address:

City:

State/Province:

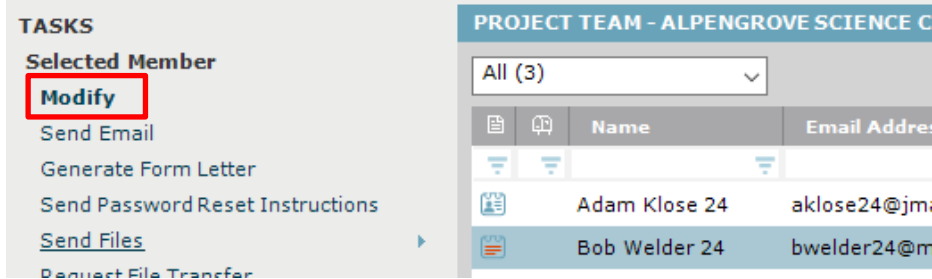
Zip/Postal Code:

Country:

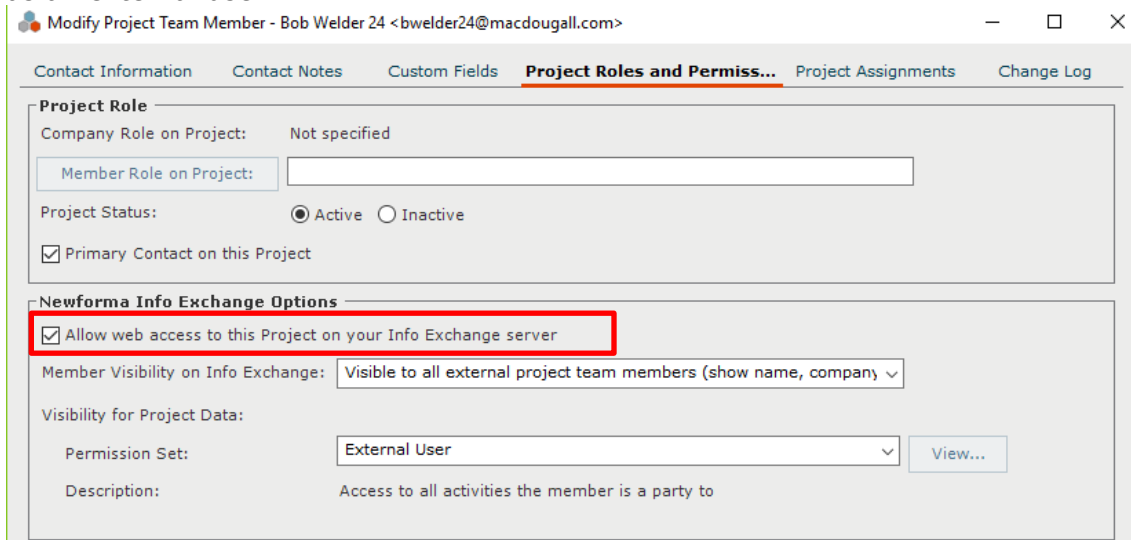
Address Type:

To give team members access to the Info Exchange website

- To give a team member access to the Info Exchange website, select their contact record and select **Modify** in the **Tasks** panel. Select the **Project Roles and Permissions** tab.



- Select the **Allow Web Access to this Project on Your Info Exchange Server** checkbox.
- Verify the correct **Permission Set** is applied. Anyone outside your company is automatically identified as an external user.



- If this is the first project the user has been given access to, they receive an email with a link to login and a temporary password. After logging in they will change their password and can access this project's information.

Note: If you want to view project information on the website, you must also join the project team.

To modify or remove team members

1. To modify a team member's information select the team member and select **Modify** in the **Tasks** panel.
2. Make any necessary changes to the **Contact Information**, **Contact Notes**, **Project Roles and Permissions**, **Project Assignments** tabs in the **Modify Project Team Member dialog box** and select **OK**.

Modify Project Team Member - Bob Welder 24 <bwelder24@macdougall.com>

Contact Information Contact Notes Custom Fields Project Roles and Permissions Project Assignments Change Log

This contact information is used across all projects.

Email Address:

First Name:

Last Name:

Disciplines:

Job Title:

Department:

Roles:

Culture:

Company

Company: [Edit](#)

Office Location:

Numbers

Work:

Mobile:

Home:

Fax:

Show in Contact Lists

Status: Active Inactive

Source:

Address

Use Office Address: [Copy It](#) [Map It](#)

Address:

City:

State/Province:

Zip/Postal Code:

Country:

Address Type:

[OK](#) [Cancel](#) [Help](#)

Read-only data imported from: Microsoft Outlook

3. To remove the contact from the project team select the contact and select **Remove** in the **Tasks** panel. This removes the contact from the project team but not the Global Contacts List.

TASKS

Selected Member

Modify

Send Email

Generate Form Letter

Send Password Reset Instructions

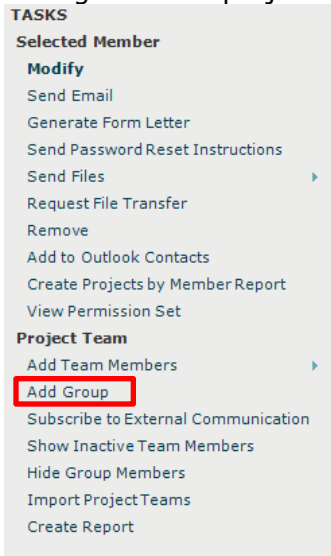
Send Files

Request File Transfer

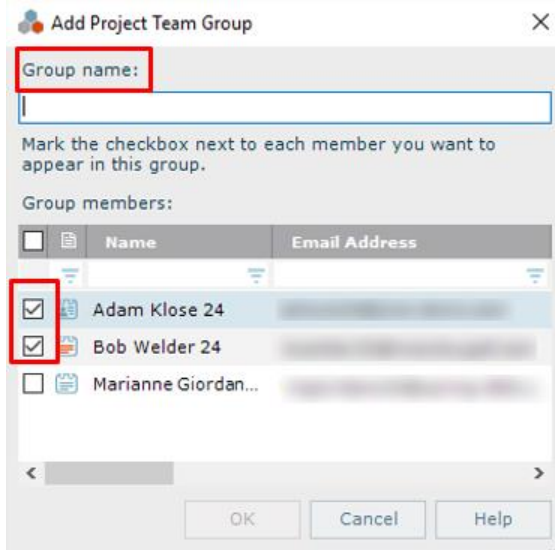
Remove

To create project team groups

1. To organize the project team into groups select **Add Group** in the **Tasks** panel.

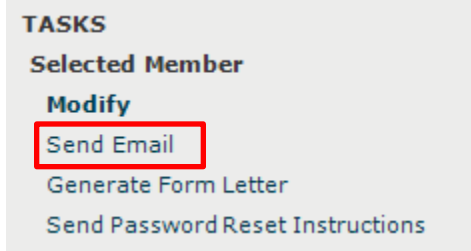


2. Assign a **Group Name** and select the **Group Members** in the **Add Project Team Group dialog box**. A team member can be assigned to multiple groups.

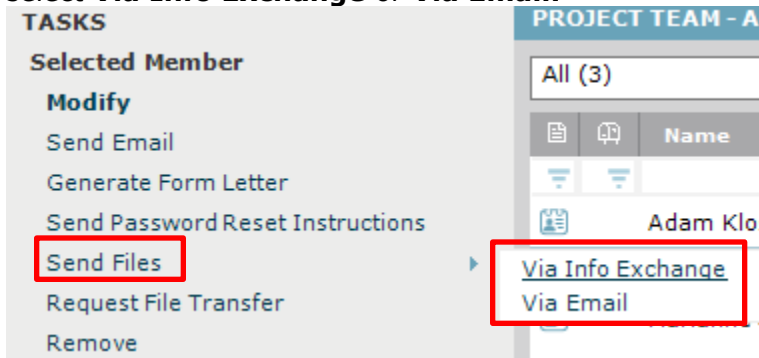


To communicate with the project team

1. To send an email to a project team member or group select the team member or group and select **Send Email** in the **Tasks** panel.



2. To send files via email or Info Exchange to a project team member or group select **Send Files** and select **Via Info Exchange** or **Via Email**.



3. Fill in the **Subject**, add any **Remarks** and **Add Files** or **Add Folders** you wish to send on the **Files to Transfer** tab. Click **Send** or **Transfer** depending on whether you chose **via Email** or **via Info Exchange**.

