



Adding DGS or DC Government Users to Projects

DGS and DC Government users (anyone with a DC.Gov email address*) are managed separately from vendor users and are not added to projects via the Directory. Follow these instructions to add your DGS or DC Government users to projects and assign them to the appropriate share group.

***NOTE: DCPS** and **FEMS** users are managed as <u>vendor</u> users due to their unique company setups in ProjectTeam. Please use the *Adding Vendor Users to Projects* QRG when adding DCPS or FEMS users to your projects.

Add User(s) to Project

- 1. Open the project you wish to add the user(s) to in ProjectTeam.
- 2. Click the **Project Administration** button.

NOTE: See your EPM if you are the DGS PM, or the DGS PM if you are the APM or SPM, and you do not see the Project Administration button.

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3. Select the Users module by clicking on the name

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eroos Recons	My Company Setup Ad a existing uses from your company to this project or remove users from this Add availing uses from your company to this project or remove users from this project.	Share Groups Group loggether similar users to help set up sharing, access, and workflow rules.	Permission Checker View each users form and field access to ensure th	hey have the correct permissions.
Calendar Calendar	Distribution Lists Group together existing share groups from companies that you're connected with.			
	Document Setup			
	Account Codes Define account codes for my company that can be used to populate my financial workaheats.	Picklist Option Sets Create predefined picklist option sets that you can add to document types.	Customize Forms Add custom forms and fields so that you can track project.	everything that happens on your
	Horkflows Create step-by-step processes that each document can follow:	Merge Templates Create custom print layouts assigned to each form type on the project.		

Cassidy Mullen

Image: State and project ---

Image: State and project formation

Yes

4. Click the **Add** button to add DGS or DC Government users

5. Use the search bar to find the user, check the box next to their name, click Add when complete

The system will allow you to select multiple users before clicking the Add button. Use the search box to start searching for a second (third, fourth, etc.) user to add after checking the box for the previous user. Click add once you have checked the box for each user that you are adding.

NOTE: Project Administration access is only assigned to the **CCS Executive Team, Executive Program Manager (EPM), Senior Project Manager (SPM), Project Manager (DGS PM), and Asst. Project Manager (APM).** APM assignment is at DGS PM discretion. Turn on Project Administrator role for users being added in the above roles by clicking on the switch in the blue box and change it to "**Yes**".

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dgs sch	٩		
	Full Name & Job Title A DGS Scheduler DGS Scheduler	Project Administrator	
Cancel		[Add
	allam.al-alami@dc.gov		

Add User(s) to Share Group

6. Return to the Project Administration section and select the **Share Group** module by clicking on the name

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	Create step-by-step processes that each document can follow.	Create custom print layouts assigned to each form type on the project.		

7. Open the share group by clicking on the share group name*

*Senior Project Manager share group used as an example. Click the name of the appropriate share group for your user(s).

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Safety	Safety Team users - DGS or Vendor role	~	-
SalesForce	CPO USE ONLY - DO NOT ADD OR REMOVE USERS FROM THIS SHARE GROUP	~	
Scheduler	DGS Scheduler - DGS Role	×	
Senior Project Manager	DGS Senior Project Manager for the project - DGS Role	×	-
Sustainability + Energy Division	Sustainability + Energy Division users - DGS role	×	-

8. Click the Add button

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9. Use the checkbox next to the user's name(s) to select the user(s) that should be added to that share group, use the search box, if necessary, click the **Add** button when complete.

Add users to share group					
Search Q					
		Full Name 🔺	Company \Rightarrow	^	
		Agyei Hargrove Executive Program Manager	Government of The District of Columbia		
	AA	Allam Al-Alami Operations Manager	Government of The District of Columbia		
	6	Brandon Johnson Special Assistant	Government of The District of Columbia		
	6	Cassidy Mullen Executive Operations Manager	Government of The District of Columbia		
		Debra Rakes Senior Business Consultant	ProjectTeam, Inc.		
	DGS MILE-	DGS ProjectTeam Support Account DGS ProjectTeam Support	Government of The District of Columbia		
	G	DGS Scheduler DGS Scheduler	Government of The District of Columbia		
	DG	Donna Green Program Analyst	Government of The District of Columbia		
	JB	Jenna Bolino Portfolio Manager	Government of The District of Columbia		
	100	John Matthew Bunch Senior Business Consultant	ProjectTeam, Inc.		
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10. User setup is complete for the added user(s)

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