Basic Navigation

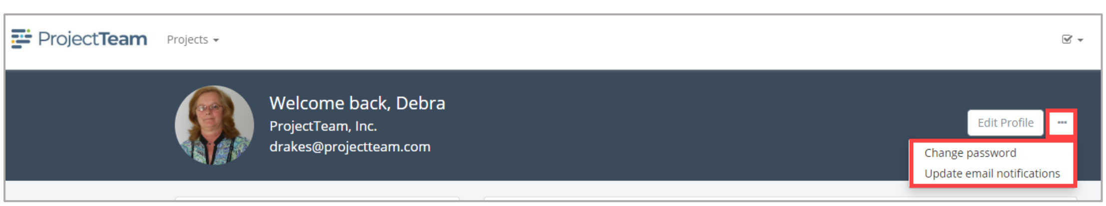
This Quick Reference Guide will explore the basic form commands for navigating ProjectTeam including accessing forms, individual panes contained on forms, icons, buttons, dropdown menus, and navigating log views.

MY PAGE

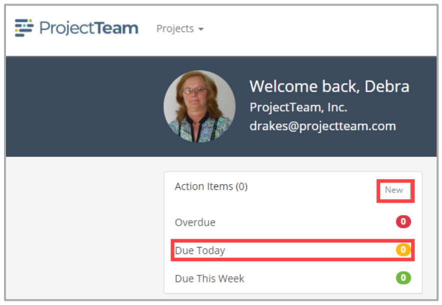
On the My Page users can Edit Profile, Change their Password, Update Email Notifications, review Action Items, review Workflow Items and review Recent Activity on their projects.

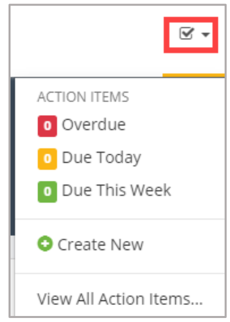
1. Click Edit Profile to change or update information about yourself or add your profile picture.

2. Click the **ellipsis button (three dots)** button to Change password and Update email notifications.

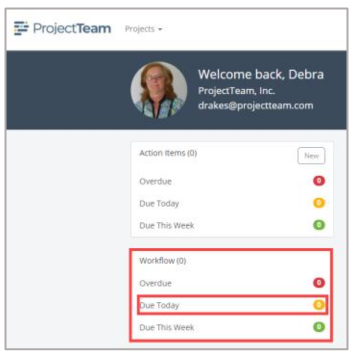


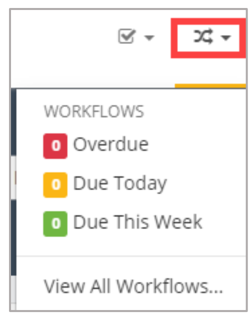
3. Click any row of the Actions Items pane to review **Action Items** Assigned to or By you. The user can also create actions items from this pane. At all locations in Project the User will always have access to **Action Items** using the icon at the top of the page.



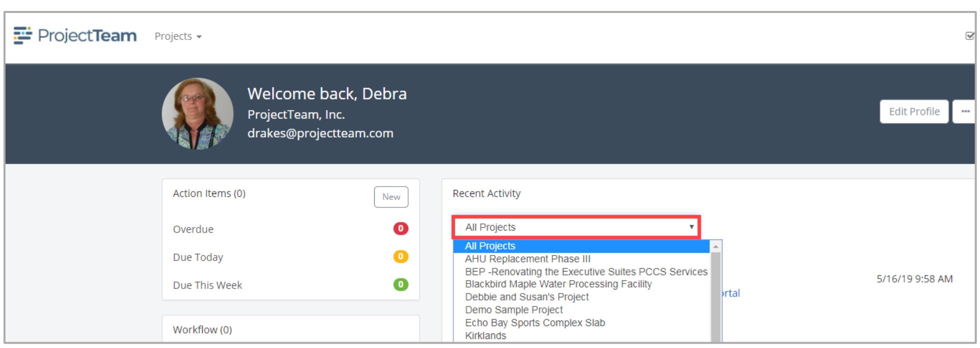


4. Click any row of the Workflow pane to review **Workflow** Assigned to you. At all locations in ProjectTeam the User will always have access to **Workflow** Items using the icon at the top of the page.





5. Recent Activity can be searched on a Project by Project level using the **All Project Search** box.



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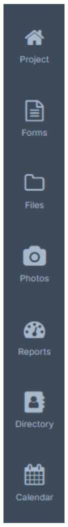
NAVIGATION PANE

The Navigation pane is accessible from every page within the project. Click on the icons to navigate throughout the project.



Opens the *Project Home Page*

Presents the links to access each Form Type.

Opens *Files shared with me* for the project.

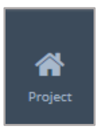
Opens *Photos shared with me* for the project.

Opens the *Reports and Dashboards* view.

Opens the *Project Directory*.

Opens the *Project Calendar*.

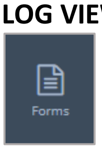
PROJECT HOME PAGE



Favorite Form Types

Favorite Form Types are a personal perference. Defining your favorite form types by clicking Edit and checking the box beside any form you want to be included in your favorites.

LOG VIEW



When you select a form type the Log View will open where you can access existing records or create a new one.

1. **New** button – adds a new record
2. **Print** button – allows the user to print a log as displayed on the view including any filters applied or sorts reflected.
3. **Ellipsis (three dots)** button – allows access to Log and Form features.
   Configure Log – allows user to view what fields they wish to see in the log view
   Batch Import – walks user through a 3 step import wizard for the form.

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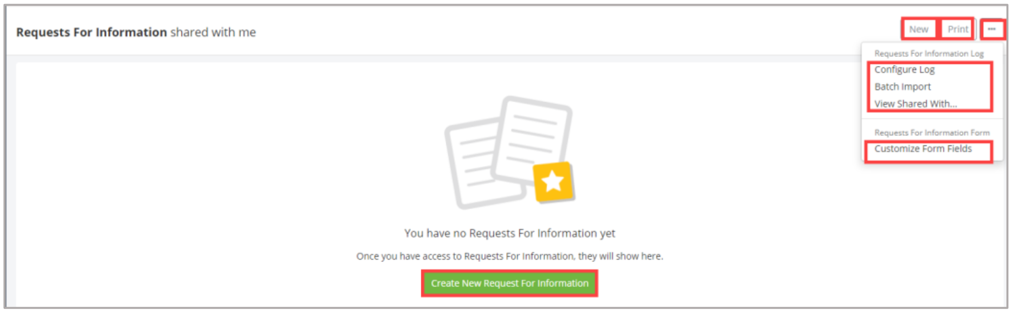
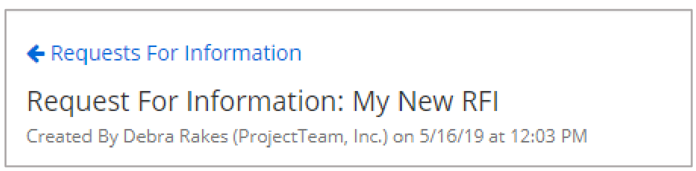
View Shared With… allows the user to see what records have been shared with a specific user.
Customize Form Fields – allows user to add or modify custom fields on the form.

4. **Create New…** - adds a new record.

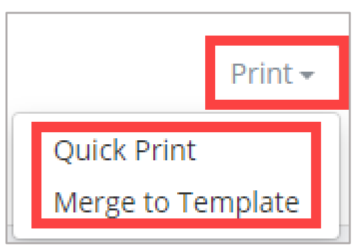


FORM VIEW
All forms contain the Document, Shared With, Details, Workflows, Attachments, Action Items, Activity and Reference Links pane. Below is a brief description of standard navigation the user has with each pane.

Document Pane
Contains the **form name cookie crumb trail** that you are currently viewing along with the **Subject**, **who created** the record with their (**Company Name**) as well as **date/time** created.

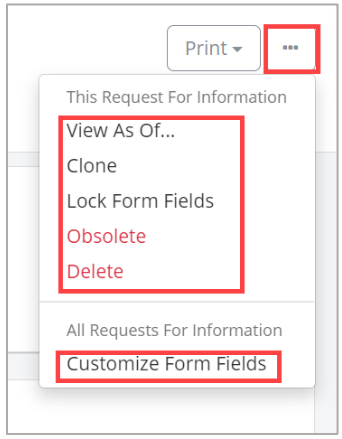


1. **Print** button – allows the user the access to **Quick Print** or **Merge to Template.**



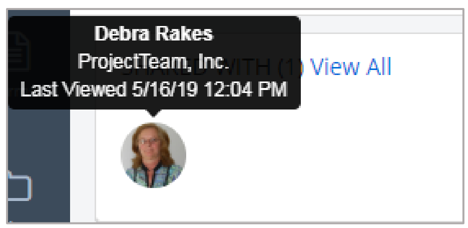
2. **Ellipsis (three dots)** button
   View as of… - allows user to view the form as it was in a previous state.
   Clone –makes a copy of the data creating a new record with the exact data.
   Lock Form Fields – lock fields so they can no longer be edited.
   Obsolete – removes the record from the log view therefore obsoleting the record. Use this function if you have already shared a document but you do not want it to show in the log view any longer.

Delete – removes the record in its entirety. User can only delete records that have not been shared with other users.
Customize Form Fields - allows user to add or modify custom fields on the form.

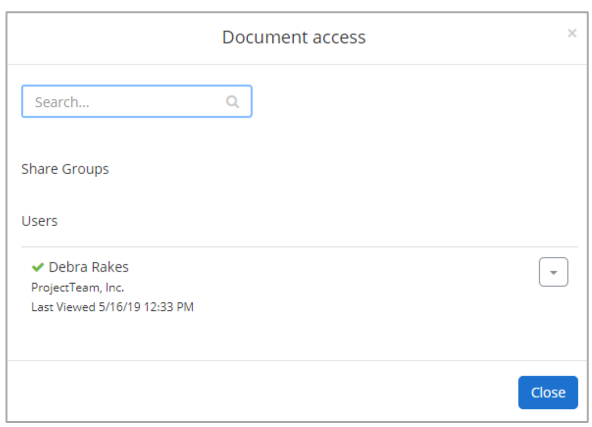


Shared With Pane
Displays all users the document has been shared with.

1. Hover over the profile picture to see when the users last viewed the record.

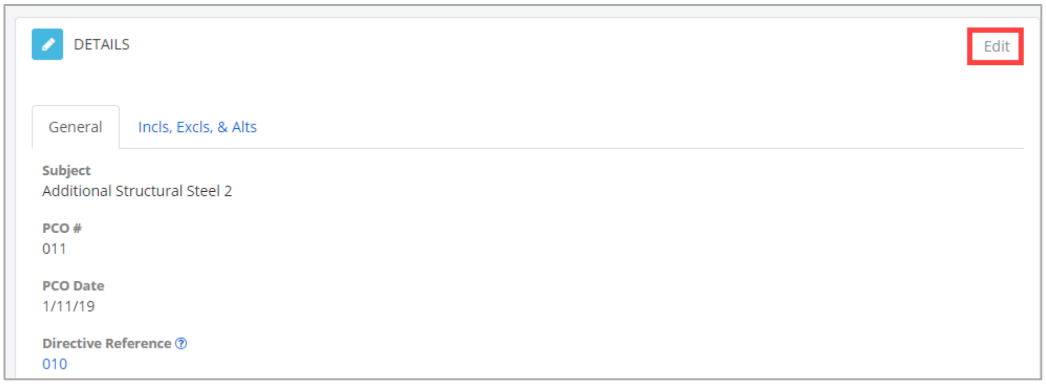


2. **View All** link – opens the Document access modal window so user can see detailed information regarding users that have access to the document.



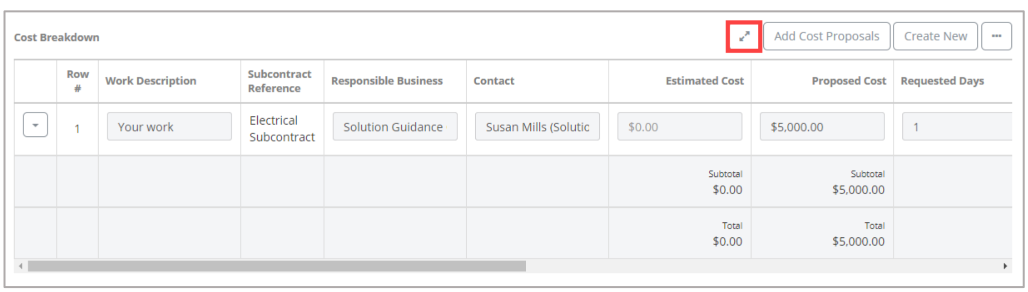
Details Pane
The Details pane contains the details for that particular form.

1. **Edit** button – takes record from view mode to edit mode so changes can be made to the record.

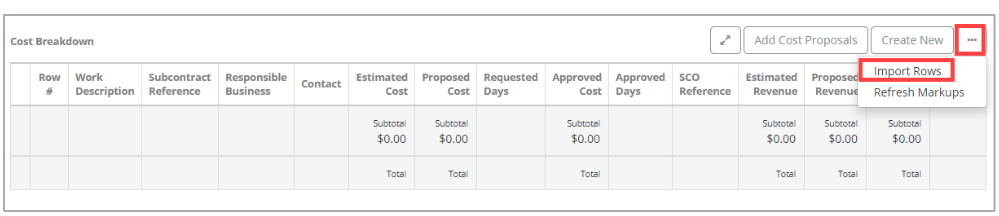


2. All required fields will have red colored borders around the field and be marked *Required in red.

3. Forms that contain collections will have a **Shannon** button, which allows the user to maximize the collection to full screen and return to original settings.



4. **Ellipsis (three dots)** button on a Collection will allow user to import rows in the collection.



Workflow Pane

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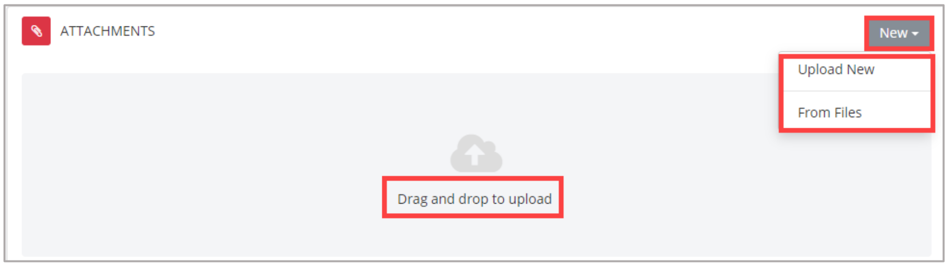
All forms contain a Workflow pane allowing users to apply workflow that has been setup for that form to be started and tracked through the document process. Multiple workflows can be applied to any form. Workflow can be configured for use on multiple forms that follow the same document process.

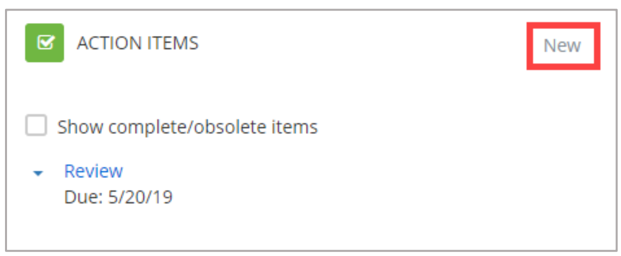
Attachments Pane

Use the attachments pane to drag and drop or upload file attachments to any form type.



Action Items Pane

Use the Action Items pane to assign action to any user on the project. Action Items assigned to you will also appear in the Action Items view.



1. Click the **New** button to create an Action Item. The Create Action Item modal window will open. Complete the required **Subject**, **Assigned To**, **Due Date** and any remaining fields necessary for a complete record.
2. Click the **Save & Share** or **Save** to save the record.

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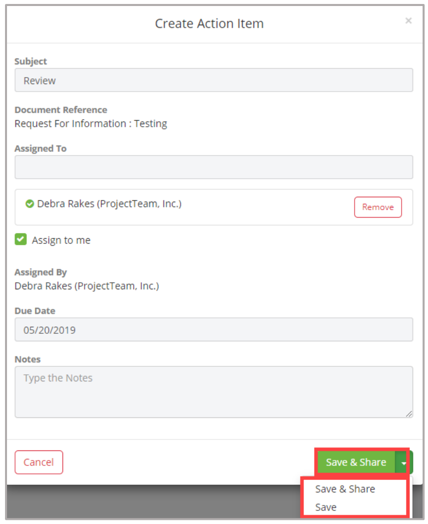
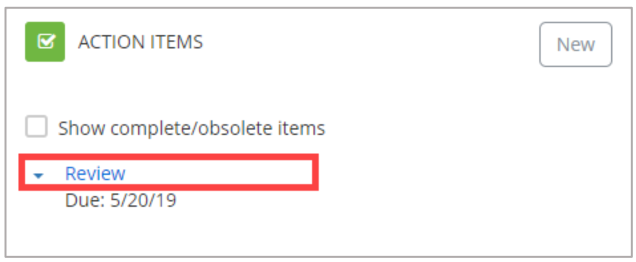
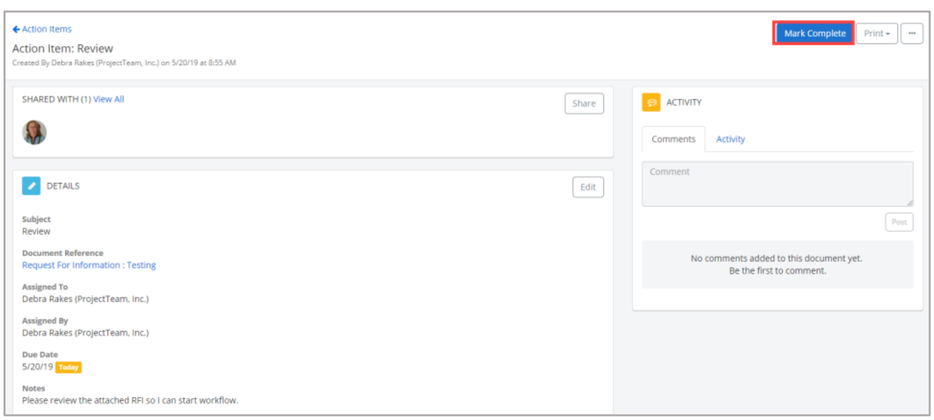


3. The Action Item will appear on the Action Items Pane. Click the **Action Item Name link** to take action and mark the item complete.



4. The Action Items record will open. Click the **Mark Complete** button at the top of the window to complete the action item.



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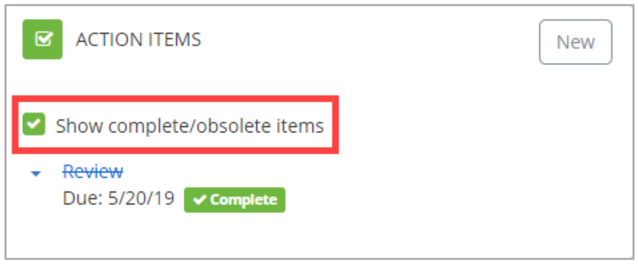
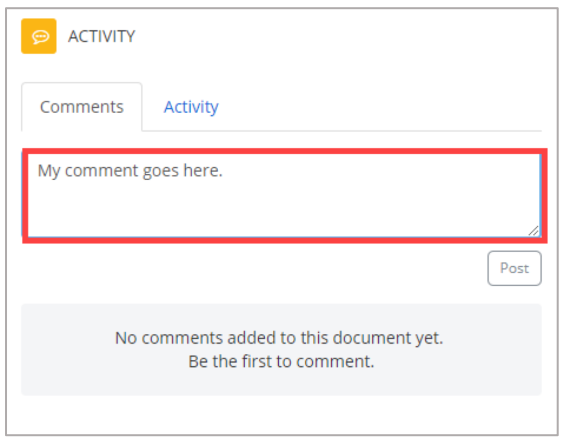
5. Click the **checkbox** to the left of **the Show complete/obsolete items** to view completed or obsoleted action items.

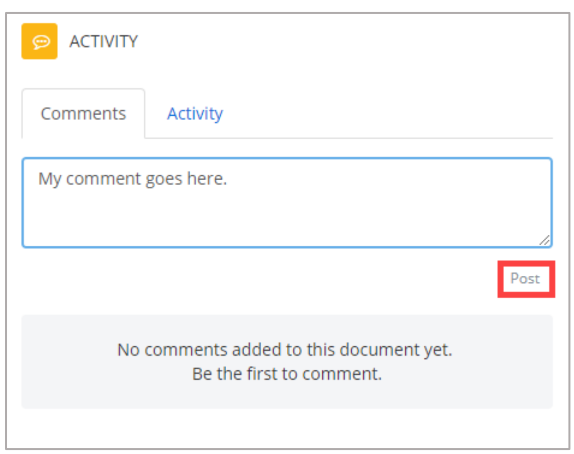


Activity Pane
The Activity Pane tracks all comments made on a form type as well as all Activity performed to that form.

1. To make a comment on a form type, enter the comment in the **Comments** box.



2. Click the **Post** button to post the comment. A notification will be forwarded to users that have enabled the Comments in their project notification configurations.



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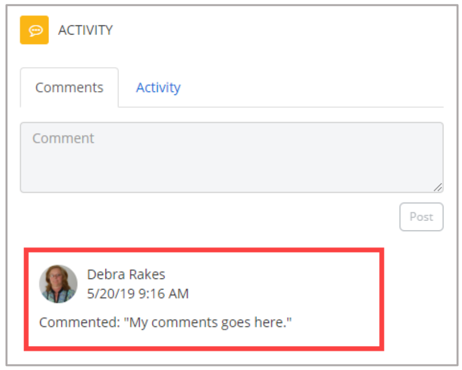
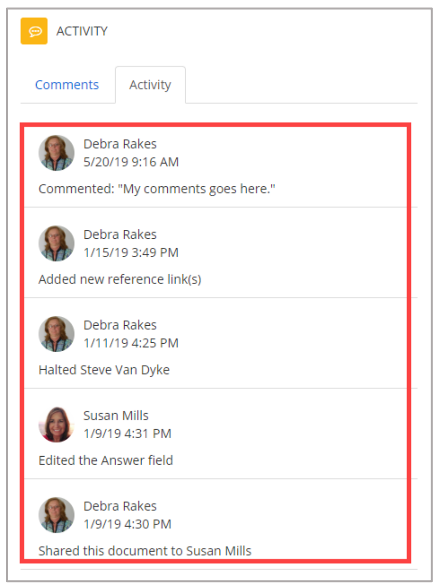
3. Your comments will be posted on the Activity Pane of the document.



4. Click the **Activity** tab. All activity performed on this document will be reported on this tab. The list will include the User's Name, Date Time of the Activity and what action was performed throughout the duration of the form type.



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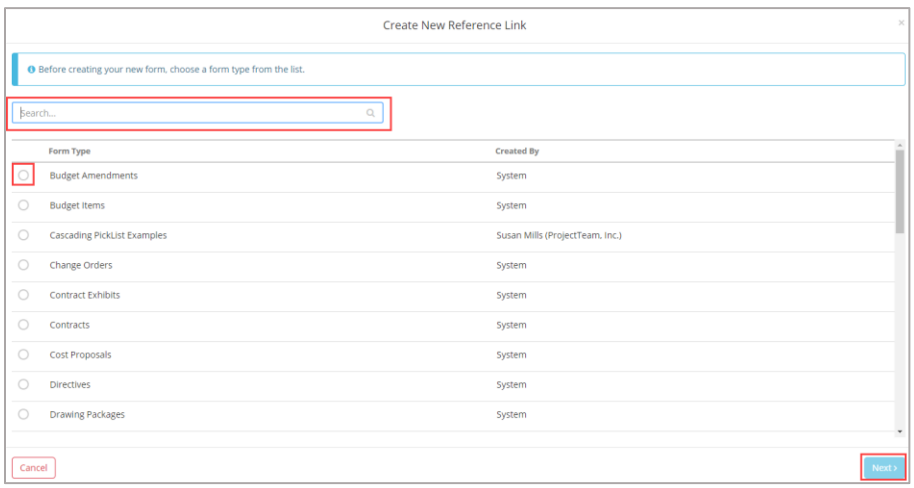
Reference Links Pane

The Reference Links Pane allows users to link multiple related form types together for ease in tracking documents that pertain to each other. Once created the link is a dual link for both form types.

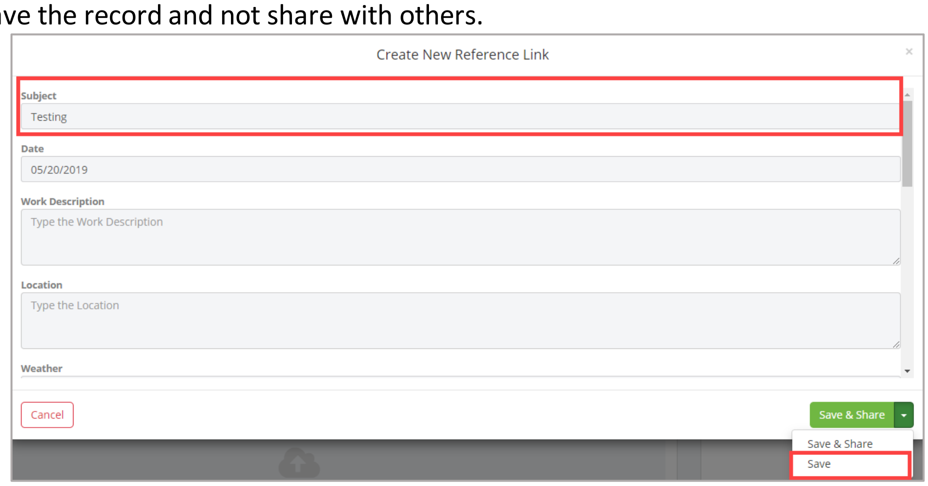
Create a New Reference Link

1. To create a new Reference Link, click the **New** button and then click **Create New**.

2. The **Create New Reference Link** modal window opens. Use the **search** box to find a form type and click the **radio button** beside the document name. Once the document form type is selected, click the **Next** button located on the bottom right corner of the screen.



3. The form selected in the previous step will open. Complete all *Required fields and any other fields necessary and click **Save & Share** to share the new document with other users or **Save** to simply save the record and not share with others.



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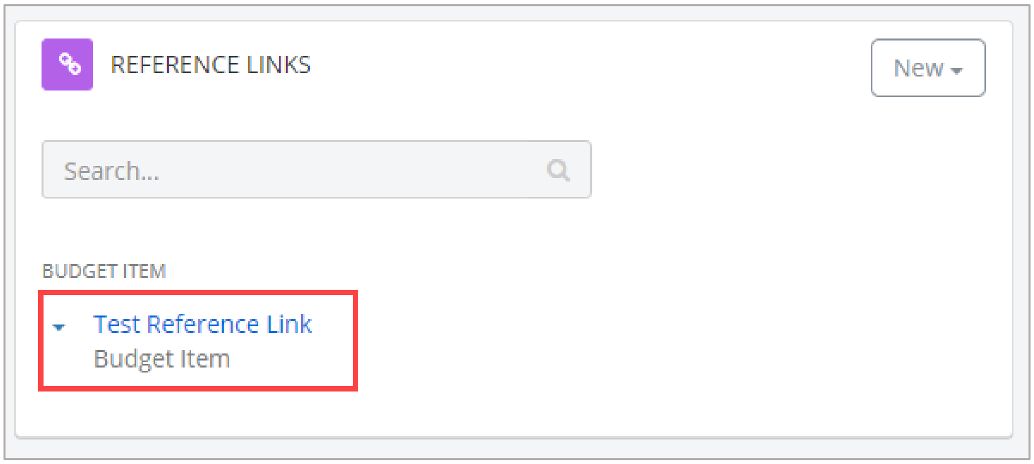
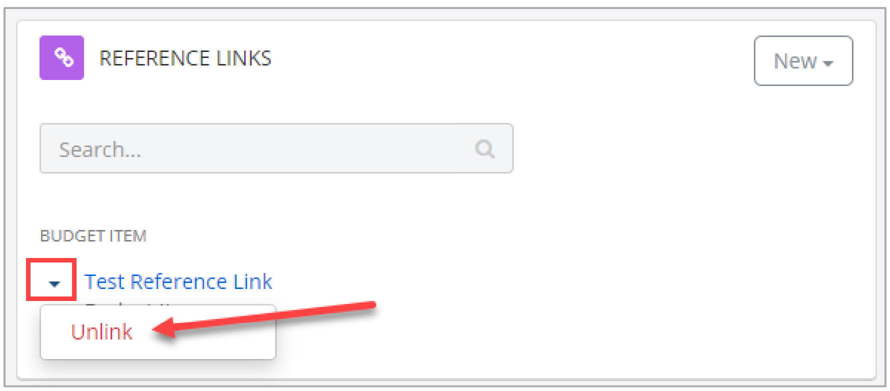
4. The linked record will be displayed as a **clickable link**.



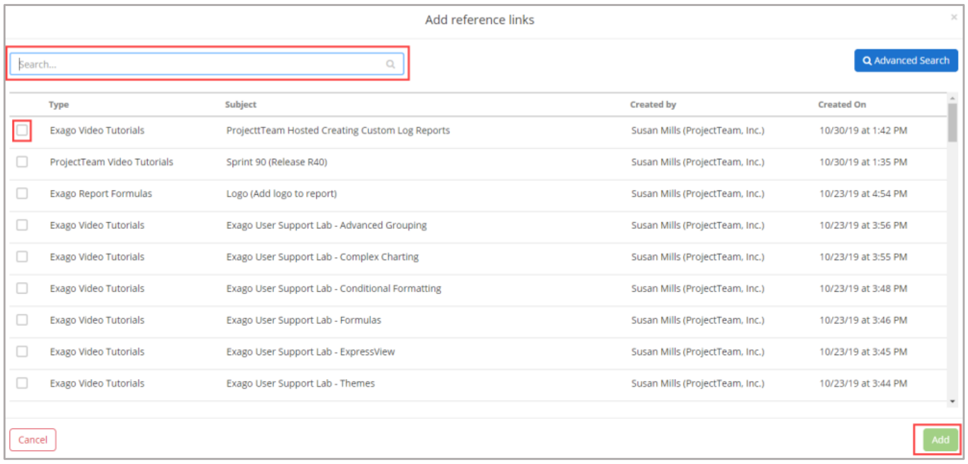
5. To unlink a Reference Link, click the **dropdown arrow** beside the clickable link and click **Unlink**.



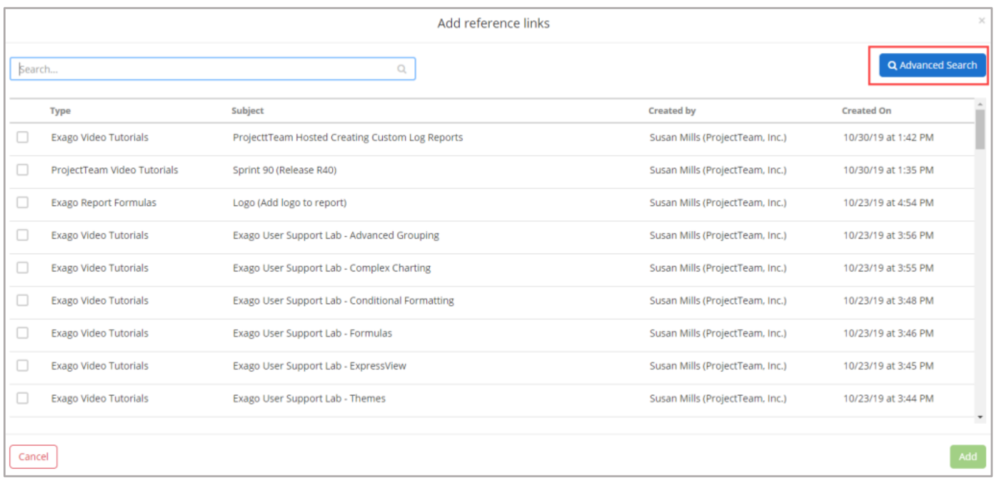
Add an Existing Reference Link

1. To add an existing document as a reference link, click the **New** button and click **Add Existing**.

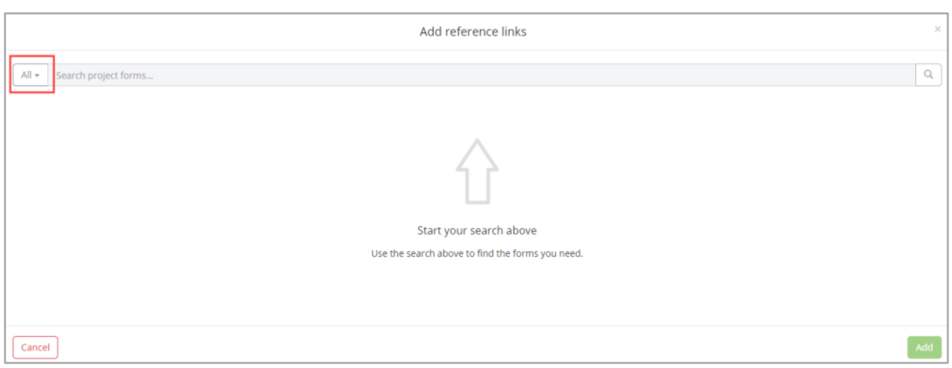
2. The Add Reference Links modal window will open. Use the **Search** feature to quickly locate a form title or use the scroll bar to manually search for a title. Once found, click the **checkbox** beside the form title to select the document and the **Add** button on the bottom of the modal window.



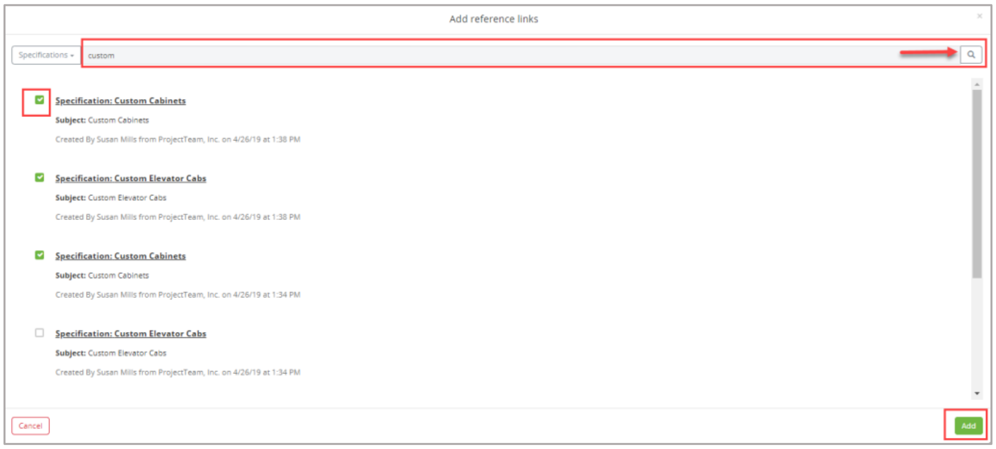
3. To filter the search by a specific form type, click the **Advanced Search** button located on the top right corner of the modal window.



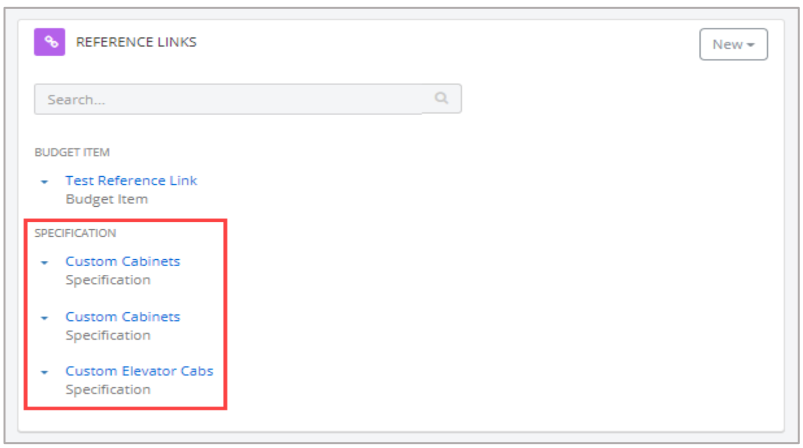
4. The Advanced Search modal window will open. Click the **dropdown** to select a form type.



5. Enter the search criteria in the **search** field and press the **lookup icon** (or press the enter key on the keyboard). Click the **checkbox(es)** to select the document(s) and click the **Add** button located on the bottom of the form.



6. The selected document(s) will be displayed as a **clickable links**. Each referenced document is listed under the form type to make it easy to quickly locate the referenced item.



Related Resources

- **Help Center Links**
  - [Workflow QRG]
- **Quick Reference Guides (QRGs) and Training Videos**
  - Project Directory
  - Sharing Records
  - Initiating and Completing a Workflow
  - Adding Attachments
  - Creating Action Items
  - Making Comments
  - Adding Reference links
  - Running Reports
  - File Management Overview
  - Photo Management

- Creating RFIs
- Responding to RFIs
- Creating Submittals
- Reviewing Submittals
- Revising Submittals
- Creating Drawings and Packages
- Viewing and Marking Up Drawings
- Revising Drawings and Packages
- Creating Meeting Minutes
- Creating Daily Reports
- Creating Punchlists
- Managing Punchlists
- Completing Punchlist Items

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