4.1 Projects: Menu Bar Functions

Version V3.10.32: 20 March 2012

Menu Bar

iProjects has thre primary workspaces: **Email**, **Contacts** and **Projects**. See UserGuide Section 2 for **Email** functions and Section 3 for **Contacts** functions. You will use the **Projects** workspace for creating and managing your projects. The **Projects** Menu Bar is shown below, in blue.

Menu bar functions are **New, Delete, Find, Modify Find, Find All,** and **Show List**. All are fairly simple functions except for **New**, which is used to create a new project and is described in detail following the other function descriptions below.

Below the Menu Bar is a set of tabs containing the Design Management functions. These functions are described in UserGuides 4.2 to 4.9.

New: See **Creating a New Project** below.

Delete: Click this Menu button to delete the project you are on. You will be presented with a dialog box asking if you want to delete the project. If you click 'Yes' it will be gone, together with all related record details, and can't be retrieved. DON'T DO IT unless it is a "practice" project you no longer want, or is the "sample" project that came with the system.

Find: Click this button to open a search screen (shown right). Enter all or part of a Project name, or any other search parameters. If the project is to be an internal project, tick the box at the bottom of the form.
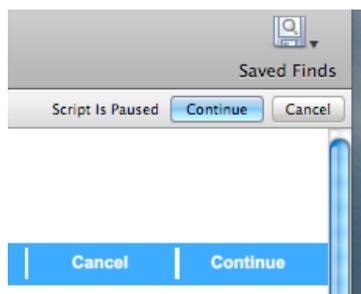
Once you've entered your search data, click the light blue "Continue" button in the upper right corner to activate your search. You can also click the white "Continue" button in the blue menu bar as shown left.

When you action the "Find", the first (or only) project in the found list will open to the project Details tab (see UserGuide 4.2 **Details**).

Modify Find: Click this button to return to the previous find and make any adjustments to find – eg to narrow a find by specifying a project location.

**Find All:** Click this button to find ALL projects in your database.

Show List: This button displays the found set in list view.

Navigation Arrows: At the far right of the menu bar are arrows for moving between a found set of projects. **<<** = "go to first project"; **<** = "go to previous project"; **>** = "go to next project"; and **>>** = go to last project. The grey font counter above these buttons tells you the number of project records and which project record you are on.

Creating a New Project:

When you go to create a new project, click **New** in the blue menu bar. That brings up the dialog box at right.
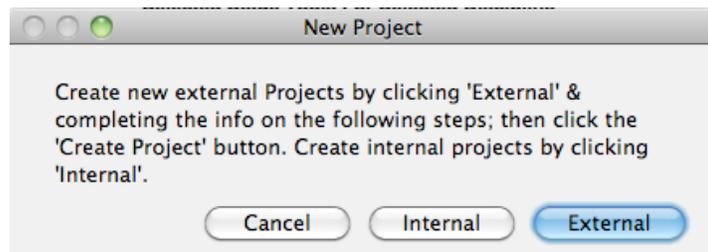
Internal projects, as the name suggests, are used internally to set up and manage projects such as "Rewrite our quality manual" or "Organize the next strategic planning retreat". They use a single form, shown and described below under *Internal Projects*.

Click **External** to create a normal project of any size. This opens the first of two project setup pages, shown below.

Step 1

Enter the Project Details by clicking inside the text field boxes (* indicates a mandatory field).

Project Status – Click in the field box to access options and select from the following three choices:

- o Proposed
- o Current
- o Closed

DDNA Disciplines / Project Type

Select <u>one</u> **Title** <u>only</u>, by checking the box under the "**Tick box**" heading, shown right.

Phase – Click in the field box to access the **Phase** options of:

- A. Proposal
- B. Feasibility Study
- C. Design only
- D. Full Services
- E. Contact admin only.

Checklist Initials

If you are using checklists, enter your initials here.

They will be the default for the selected checklists.

This enables you to re-assign any checklist item to any other team member on the checklists – See UserGuide 4.5 *Checklists*.

Start Date

Click in the text field box to select the Project start date, from the calendar.

Completion Date

Click in the text field box to select the Project completion date, from the calendar.

Week or Month

If the Project is less than 12 weeks long, set this to week.

Checklists / TeamWork Tools

By default the Checklist and TeamWork tools are included. If they are not needed for the Project, uncheck one or both as appropriate.

Use Checklists? ☒
Use Teamwork? ☒

Checksets

Select any combination of QM, GS, ESO, BIM and or Risk as appropriate to project. Refer to UserGuide 4.5 *Checklists* if unsure.

> QM - Quality Management Project
>
> GS – Green Star Project
>
> ESO – Environmentally Sustainable Design Project
>
> BIM – Building Integration Modelling Project
>
> Risk – A Project where state laws (e.g. QLD) require higher than usual designer responsibility for risk during construction
>
> Contract for Construction: Select one of AS 2124, or the appropriate Australian Building Industry Contract (ABIC) BW-1, SW-1 or MW-1 only if Stage includes Contract Administration.

Click the **Next** button, to the far top right of the current screen. This button opens a new screen and step in the process: "**Step 2/2 – Contact**"

The **Previous** button returns you to the previous screen "**Step 1/1 – Details**".

Next step: Select the Client Firm for your Project.

The list can be filtered by entering a name (or part of the name) into the Contact Name Filter, then click "Enter".

Contact Name Filter Buil

The information for a contact that can be viewed here: First or Firm Name, Type (Person or Firm), Address, City, Firm Type and Business/Tax Code.

To the left hand side of the "First or Firm Name" title/s, you can see two selections, Select and View. If you click on Select the First or Firm Name Contact is highlighted in a light green. You need to click Select (highlight in a pale green) for your choice (even if there is only one name presented), otherwise it will not be selected.

		Projects					
Create Project	Cancel						

| Step 1/2 - Details	Step 2/2 - Contact

Previous

Step 2 - Select the Client Firm for your Project. The list can be filtered by entering a name (or part of) into the 'Contact Name Filter' then click 'Enter', and click 'Select' for your choice (even if there is only one name presented).

Step 3 - Click "Create Project" in the blue menu bar above.

Contact Name Filter buil

		First or Firm Name	Type	Address	City	Firm Type	Business/Tax Code
Select	View	Building Code Consultants Ltd	Firm	PO Box 99 613	NEWMARKET, AUCKLAND		
Select	View	Building Design Research Centre	Firm	332 Albert St	East Melbourne		
Select	View	Building Services Engineers	Firm	Level 2, 121 Walker Street	NORTH SYDNEY		
Select	View	Building Technology Pty Ltd	Firm	242 Dorcas St	South Melbourne		
Select	View	Built Vision Pty Ltd	Firm	PO Box 354	UNLEY		
Select	View	CME Building Services	Firm	PO Box 170	NORTH SYDNEY		
Select	View	Master Builders Association of Victoria	Firm	GPO Box 544	MELBOURNE		
Select	View	Sustainable Built Environments	Firm	Level 28, 140 William Street	MELBOURNE		

If you look down at the bottom of this screen (not shown above) you can see **Contact to be used for new Project*** If selected correctly, as per the above instruction, the contact selected will also appear at the bottom of the page (see below).   Previous "searches', if applicable, will remain selected until you select the current contact you require.
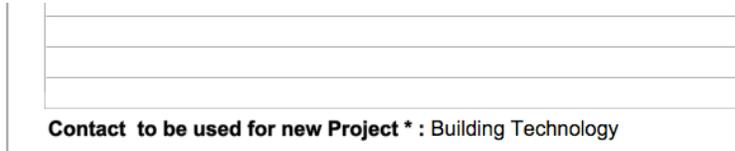
Contact to be used for new Project * : Building Technology

If you click on <u>View</u> you will open the **Contacts** Screen and you will be able to view the Contact's **Details** in full.

The last step in creating a new project is to click the **Create Project** button in the blue menu bar. Then you should go to **Project Team** (refer UserGuide 4.6) and build your team contact list.

Internal Projects

To create an internal project, click **Internal** in the **New Project** dialog box, which will give you a blank form PF01, shown below:

Use this form for internal Projects e.g. Those where the firm, is the 'Client'. Complete as appropriate. Set priority using the editable drop-down pane.

Project Owner means the person responsible for delivery of the internal project.

Select 'P' for Primary task responsibility or 'S', for Supporting task responsibility.

The trashcan at the end of each line item enables you to delete the line items not required.

At the top right of the screen you will see a mini control panel, with the following features:

♦ The **Email** button creates a pdf file of this form and opens an email in the Email module to send to the people who need to see it. Refer Section 2: **Email**.

♦ **Preview**, **Print** and **Zoom** are obvious, although if you use **Preview**, you need to know that to get out of Preview mode, you need to click the Continue button in the Header, as shown at right.

♦ The **New** button is available only on *List View* forms, and is used to add another record to the list.

♦ The **Dupe** button means "duplicate", and is used where this feature is needed in filling out the form.
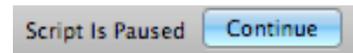
Note that the bottom of PF01 provides a text entry field for Lessons Learned (not shown in the screen shot above). Use this space to capture information, as appropriate, required as part of an ISO 9001 quality management program. Copies of PF01 with entries in this field should be forwarded to your Quality Manager.